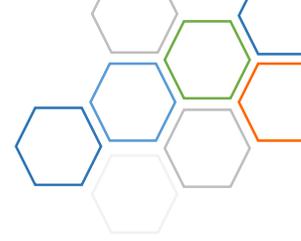


State of the Workforce Report



BillingsWorks
Workforce Council

2015



Acknowledgements

The BillingsWorks Workforce Council would like to thank the many organizations and individuals that contributed to the development of this State of the Workforce Report. In particular, we thank Governor Steve Bullock and the Montana Department of Commerce for funding support.

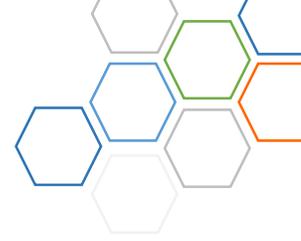
In addition we thank all members of the BillingsWorks Workforce Council and the State of the Workforce Steering Committee for their leadership, vision, and input throughout the strategic planning process. We also appreciate the time and insights shared by hundreds of stakeholders from business and industry, education, economic development, workforce development, and community-based organizations. These stakeholders participated in focus groups, interviews, and an employer survey providing important information and feedback to shape the State of the Workforce report.

This project was funded, in part, by an award from the Montana Department of Commerce, Big Sky Economic Development Trust Fund Planning Grant. Thomas P. Miller and Associates, LLC provided research, analysis, and strategic planning assistance throughout the duration of the project.



A community collaboration with

Big Sky Economic Development,
Billings Chamber of Commerce,
School District #2,
Career Center and Adult
Education,
MSU Billings and City College,
Rocky Mountain College,
City of Billings,
Yellowstone County,
Billings Job Service,
MT Departments of Labor and
Commerce, and
80+ private industry partners.



Contents

Introduction	3
What We Have Learned	5
Workforce Indicators	8
The BillingsWorks Talent Dashboard	9
Demographic Indicators	10
Housing Indicators.....	12
Education Indicators.....	13
Job and Workforce Indicators	16
BillingsWorks Workforce Council Action Plan	22
Mission and Vision.....	22
Goal 1: Position the BillingsWorks Workforce Council as the tool for collaboration, accountability, and reporting related to workforce needs and as the go-to resource for workforce development information, coordination, and connections.....	23
Goal 2: Address the immediate and sector-specific talent development and talent attraction needs of Yellowstone County businesses.....	25
Goal 3: Ensure the alignment of our higher education, career and technical education, and K-12 education and training systems with current and future workforce demand.....	26
Goal 4: Launch a talent attraction campaign that promotes the benefits of living and working in Billings and Yellowstone County.....	30
Community Strategic Imperative: Develop and implement a vision for the strategic quality of place investments for Yellowstone County that supports talent attraction and talent retention in the community	32
Measuring Success	33
Call to Action	34

APPENDICES

Appendix A: BillingsWorks Workforce Survey Analysis

Appendix B: Education and Training Profile and Gap Analysis

Appendix C: Workforce Indicators for Peer Communities



Introduction

Yellowstone County employers have plans to hire. **In fact, it is estimated that they have plans to hire over 1,000 new workers in the next year alone¹** and their ability to do so hinges, in part, on the availability of qualified talent to fill these jobs. The good news is that Yellowstone County has a very active and engaged labor force as demonstrated by its 68.8 percent labor force participation rate (compared to 63.8 percent for the U.S.). Furthermore, Yellowstone County has a robust system of education and training providers available to equip workers with the knowledge, skills, and abilities needed by business and industry.

However, more work needs to be done to ensure that qualified talent is available to Yellowstone County employers who plan to hire. Currently, not all employers are confident in the quality of the Billings workforce. The 2015 BillingsWorks Workforce Survey found that only 47 percent of employers are confident in the overall quality of the workforce. Furthermore, According to the employer survey, nearly 7 in 10 employers reported that a lack of available workers hinders business growth.

It is clear, then, that in order for Billings and Yellowstone County to continue to grow and prosper, the quality and availability of talent is a top priority. We know providing a highly-skilled

talent pool requires a multi-faceted approach that involves partners from business and industry, education, economic development, workforce development, local government, and community organizations. It is through a *collective* effort of all partners, rather than individual projects, that Yellowstone County's talent pool will grow and advance.

This is the reason the BillingsWorks Workforce Council exists – **to cooperatively identify workforce issues, establish goals, develop and implement strategies, and monitor outcomes to address near and long-term workforce needs.** Through a collaborative approach that is informed by data, the Billings community will become the premier business-driven workforce development hub in the economic development region by 2023.

Methodology

The State of the Workforce Report and BillingsWorks Workforce Council Action Plan was developed through a six-month process that included primary and secondary research, engagement with local stakeholders, and strategic planning with the BillingsWorks Workforce Council. Specifically, this included the following elements:

¹ BillingsWorks Workforce Survey, see Appendix A.



- **Focus Groups** – Four industry-based focus groups were held with participants from Information Technology (IT) and Communications; Healthcare; Retail and Hospitality; and Manufacturing, Engineering, and Energy industries. In addition, one focus group was held with young professionals to gather their perspectives on living and working in Yellowstone County.
- **Stakeholder Interviews** – Interviews were conducted with stakeholders from education, workforce development, community-based organizations, and economic development. Approximately 15 interviews were conducted.
- **BillingsWorks Workforce Survey** – As part of the BillingsWorks workforce planning and analysis process, over three thousand businesses in BillingsWorks service region were surveyed to gather insights on workforce development challenges and opportunities. A total of 363 respondents completed the sixteen question survey between January 5 and February 5, 2015.
- **Workforce Indicators** – With findings from focus groups, knowledge of best practices, and input from the BillingsWorks Workforce Council, workforce indicators and benchmarks

were developed to measure progress on goals and strategies.

- **Strategic Planning Session** – A full-day, facilitated strategic planning session was held with the BillingsWorks Workforce Council to set goals, identify strategies, and begin to develop an action plan for talent development in Yellowstone County.

What We Have Learned

The focus groups, stakeholder interviews, and the BillingsWorks Workforce Survey uncovered valuable data and insights that has informed the strategic planning process and BillingsWorks goals. Key findings are outlined below.



The talent pool is shallow for all industries.

In each of the focus groups, employers reported there is not an adequate supply of talent available to meet their needs. In other words, the talent pool is very shallow in Yellowstone County. In fact, the talent shortage is so severe for some industries that employers are focused on securing candidates for interviews regardless of qualifications or skill levels.

According to the employer survey, nearly 7 in 10 employers reported that a lack of available workers hinders business growth. Furthermore, employer survey respondents have mixed feelings about workforce quality. Half of respondents are confident in the overall quality of the workforce, while the other reported a lack of confidence in overall workforce quality.

While focus group participants reported significant talent shortages across all positions, the skill-levels and positions which are hardest-to-fill are unique for each industry.

²Employability skills include critical thinking, team work, communication, respect, integrity, initiative, dependability & reliability, adaptability, professionalism, planning &

Hardest-to-Fill Positions and Skill Levels Reported in Focus Groups:

- Manufacturing, Engineering, Energy: Technical and/or skilled trade positions; professionals with 5 – 10 years of experience
- IT and Professional Services: Mid-level professionals with 5 – 10 years of experience; entry-level workers with necessary technical skills
- Healthcare: All levels affected from physicians and psychiatrists to RNs and therapists to support positions
- Retail and Hospitality: Entry-level and mid-level management

According to the survey, employers find it difficult to find candidates with industry-specific technical skills and preferred credentials while general skills (such as reading, writing, and mathematics) are reported as relatively easy to find. **In addition, survey data suggest an even bigger challenge exists in finding candidates with employability skills.** Half of survey respondents stated they had problems finding candidates in almost all of the employability skills,² but they have the most difficulty finding candidates with sufficient critical thinking, initiative, and problem solving skills.

organizing, problem solving, decision making, customer focus, business fundamentals, and drug-free.



Skilled trade and technical positions have the lowest workforce availability and longest recruitment times, as reported by survey respondents. Entry-level/support positions offer the best workforce availability and shortest recruitment times, followed by professional positions. Professional positions showed the biggest improvement in talent attraction and retention from 2013 to 2014.



Shallow talent pool = churn within the workforce

The shallow talent pool within the Billings community creates competition for talent within and across industries. Employers in the focus groups reported that local talent is highly mobile, meaning they are willing to move from company to company for nominal increases in pay, benefits, or opportunity. Recognizing this, participants from each of the focus groups admitted to talent “poaching” – recruiting talent from industry competitors by offering higher wages, benefits, or other career opportunities. This creates significant churn within the workforce and a steady stream of job openings that do not result from business growth, but the need to fill replacement jobs.

Compounding the local competition for talent, employers from every industry cited the Bakken oil field as a major factor in the ability to find qualified talent. Individuals from the Billings area are willing to drive several hours and earn, in some cases, 30% more for jobs in the Bakken³. While the quality of life and work environment is more difficult in the Bakken, it is still very difficult for employers to compete with such significant wage differentials.

In order to combat churn within the workforce, employers in each of the industry focus groups

³While competition from the Bakken was strong during the writing of this report, BillingsWorks

reported that they have tried various retention efforts with mixed results. Some companies have offered retention bonuses after 3-, 6- or 12-months. Others have made improvements or adjustments to their company culture. Others still are utilizing “trial periods” for new workers (e.g. internships, temp-to-hire) to determine a workers’ long-term career plans and to ensure workers are engaged with the company’s mission and organizational values early in the relationship. Internships and temp-to-hire strategies were reported as the most successful of the various retention strategies tried by employers.



Continuous Recruitment from Outside of the Community

The lack of available talent, compounded by the workforce churn, has led many employers to recruit continuously and proactively from outside of the Billings and Yellowstone County community. This is especially true for technical and professional positions. Employers are recruiting emerging talent from colleges and universities throughout Montana as well as conducting national searches for professional positions. While these recruitment efforts are eventually successful in most cases, they pose additional concerns to the employer including:

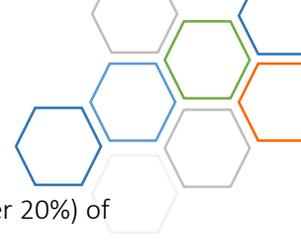
- Cost to employers
- Ability to offer competitive wages
- Job opportunities for spouses
- Questions about quality of place



Talent Attraction and Retention Challenges

In both the industry focus groups and the young professionals focus group, participants identified several talent attraction and retention challenges. These include:

recognizes that this may change as industry trends evolve.



- *Pay* – Employers in the focus groups recognized that their ability to offer competitive wages impacts their talent attraction and retention success. When competing with other parts of the country for talent, Billings employers recognized their pay scales are often less competitive. This is especially true when competing for talent with the Bakken oil field which, in some cases, offers 30% more in wages.
- *Housing* – Young professionals cited concerns about the availability of affordable housing when their peers may consider relocating or continuing their careers in Billings. The participants in the focus groups noted that it is difficult to find homes in the area under \$250,000 and/or in line with their preferences.

These focus group findings are consistent with results of the employer survey. The greatest barrier reported in the survey is pay (with over 70% of respondent ranking pay as one of their top three barriers), followed by benefit (41%), job opportunities (37%), and housing (29%).



Alignment of Training and Education with Business Needs

Employers who participated in the industry focus groups reported that post-secondary education and training providers in the area offer *quality* programs, **but the *quantity of completers is not sufficient***.

Similarly, survey results indicate employers are confident in the quality of postsecondary education in Yellowstone County but report less confidence in secondary institutions. **Nearly half of all businesses who responded rated highly the quality of three education and training providers: Rocky Mountain College, MSU-Billings, and City College at MSU-Billings.** Area High Schools received over 40% positive feedback; however,

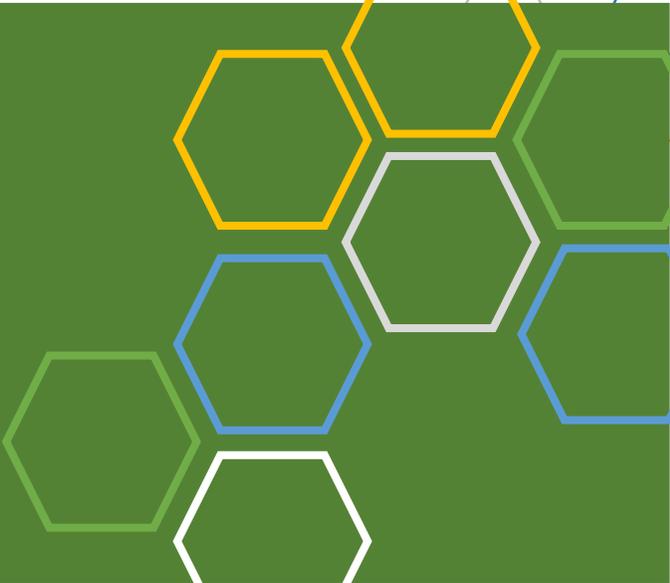
they also received the highest rate (over 20%) of negative feedback.

In general, employers noted in each industry focus group that the career exposure and awareness activities need to be increased in K-12 education. Employers expressed concerns that young people are not aware of the various career opportunities and specific companies providing jobs in their local community. Focus group participants suggested strategies that encourage business and industry representative to spend more time in the classroom as well as strategies that provide opportunities for young people and school personnel to spend in real-world work environments.

The BillingsWorks Training Profile and Gap Analysis included in Appendix B of this report provides an overview of the education and training systems in Yellowstone County, programs offered, and outcomes of their graduates. In comparing this data with employers' needs, several clear gaps emerge including:

- Additional capacity and new programs related to healthcare occupations, specifically an Associate of Science in Nursing (ASN) to a Bachelor of Science in Nursing (BSN) completion program
- Expanded depth of knowledge for students completing existing 2-year programs in information technology
- Increased graduates in engineering-related fields and skill trades programs
- Embedded employability skills training throughout all levels of education
- Retention of “talent in transition” – those individuals who are transitioning from high school to post-secondary education or from post-secondary education to the labor market

These gaps are explored in more detail in Appendix B.



Workforce Indicators

Based on the perspectives and insights shared by employers, young professionals, and community partners, BillingsWorks identified twenty (20) indicators of progress to represent the state of the area's workforce as well as to measure progress toward its strategic goals.

Indicators identified include demographic and cost of living indicators, education indicators, and job and workforce indicators. For some indicators, data are publically available to track changes and trends. For others, data were captured through the BillingsWorks Workforce Survey and from partner organizations. BillingsWorks will update these data annually to identify trends and progress toward goals.

Of the twenty indicators that will be track progress, BillingsWorks has identified six indicators that comprise the Talent Dashboard, a brief snapshot of the health of Yellowstone County's workforce. These indicators are included below and discussed further in the pages that follow.

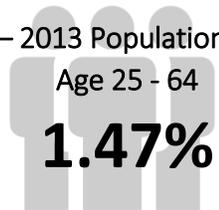


THE BILLINGSWORKS TALENT DASHBOARD

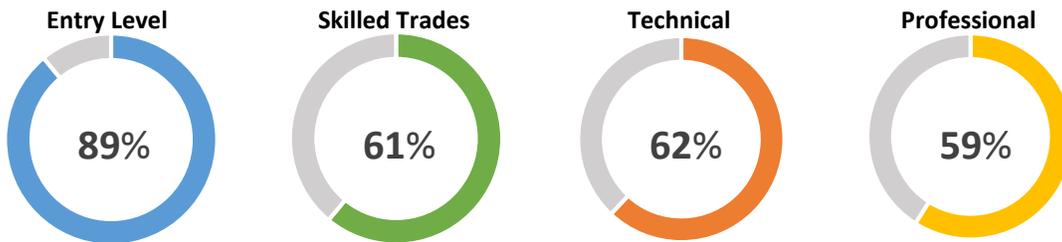
Overall Confidence in the Workforce*



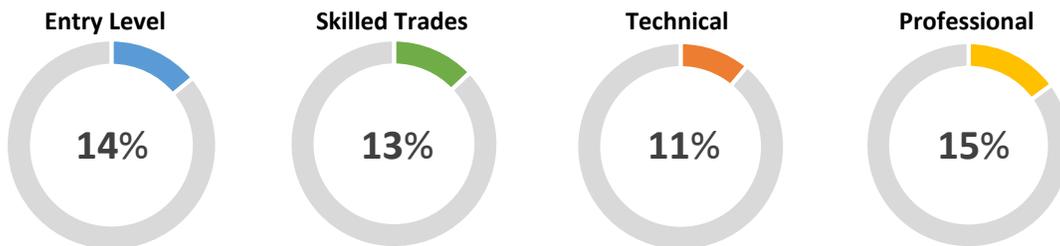
2010 – 2013 Population Growth
Age 25 - 64



JOB POSTINGS FILLED WITHIN 3 MONTHS*

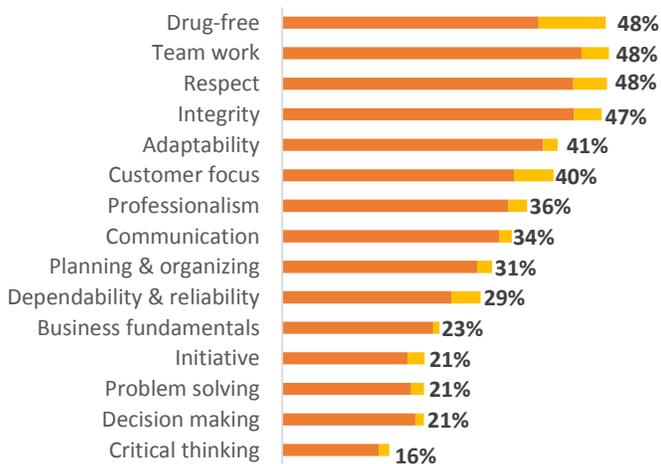


REPORTED INCREASES IN THE NUMBER OF QUALIFIED JOB APPLICANTS*

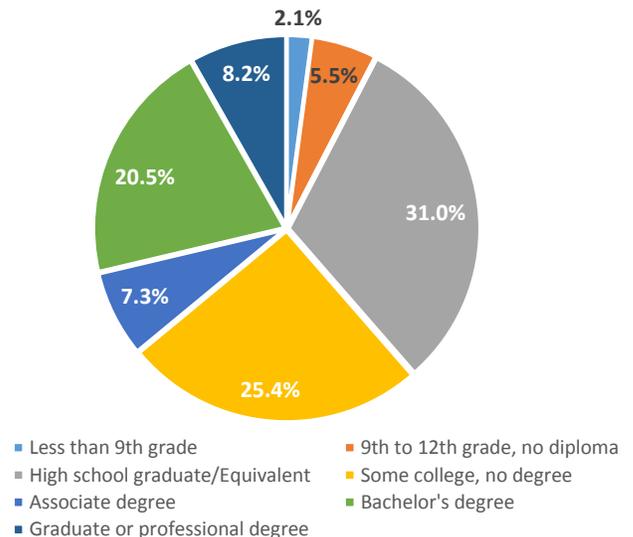


EMPLOYABILITY SKILLS*

Percent **EASY** + **VERY EASY** to find



2013 EDUCATIONAL ATTAINMENT



*As reported in the BillingsWorks Workforce Survey. *Overall Confidence in the Workforce* represents the percentage of employers who "Strongly Agree" or "Agree" with the following statement: I am confident in the overall quality of the workforce in Yellowstone County. *Reported Increases in the Number of Job Applicants* indicates the percentage of employers who reported increases in the number of qualified applicants over the past year. Percentages for *Reported Increases in the Number of Job Applicants* and *Jobs Filled within 3 Months* do not include employers who responded "Not Applicable."



Demographic Indicators

IN THIS SECTION...

Population – Population growth in key segments of the population indicates the universe of talent that is or will be available for employers in the community. Positive growth in the population aged 25 – 64 years suggests increases in the pool of workers.

Labor Force Participation – The community’s labor force participation rate measures the percentage of the labor force (age 16 and over) who are either working or actively seeking employment. Labor force participation is an important indicator as it provides an idea of how engaged the available workforce is in the employment market.

Per Capita Personal Income – Increases in per capita personal income over time can indicate economic growth for Yellowstone County and can be used in comparison with peer communities and the state. Per capita personal income is calculated as the personal income of the residents of a given area divided by the resident population of the area.

POPULATION

The population in Yellowstone County grew by 1.48 percent or 2,184 individuals from 2010 to 2013. While the overall growth is a positive sign, there are key segments of the population that saw negative growth; of particular concern is the segment of the population aged 15 – 24 which declined by -1.58 percent within the same time period. These individuals represent the emerging workforce that is or will be available to fill employers’ entry-level needs today as well as five years from today.

Yellowstone County Population	2010	2013	% Change
Total Population	147,972	150,156	1.48%
Population under 15 years of age	29,200	29,746	1.87%
Population aged 15 – 24 years	19,089	18,788	-1.58%
Population aged 25 – 34 years	20,067	20,537	2.34%
Population aged 35 – 44 years	17,789	18,296	2.85%
Population aged 45 – 54 years	22,223	21,576	-2.91%
Population aged 55 – 64 years	18,736	19,562	4.41%
Population aged 65 years and older	20,868	21,651	3.75%
Population aged 25 – 64 years	78,815	79,971	1.47%

Source: US Census Bureau; American Community Survey, 2013 Five-year Estimates



LABOR FORCE PARTICIPATION

Yellowstone County has a significantly higher labor force participation rate (68.8 percent) compared to the State of Montana and the rest of the country. At five percentage points higher than the national rate, this indicates that the workforce within Yellowstone County is active and engaged in the labor market.

	Yellowstone	MT	USA
Labor Force Participation (2013)	68.8%	64.2%	63.8%
Population 16 years and over	118,504	801,199	246,191,954
In labor force	81,670	518,296	158,197,577
Civilian labor force	81,514	514,717	157,113,886

Source: American Community Survey, 2013 Five-year Estimates

PER CAPITA PERSONAL INCOME

The per capita personal income in Yellowstone County is higher than the State of Montana, but lower than the nation. Per capita personal income is \$3,269 higher in Yellowstone County than the state. **While national per capital personal income is higher than both Yellowstone County and Montana, both the state and county grew at a faster rate from 2010 to 2013 (13.7 percent and 13.1 percent respectively compared to 11.5 percent for the nation), suggesting more rapid growth at the state and county levels.**

Per Capita Personal Income	2010	2013	% Change
Yellowstone County	\$37,707	\$42,635	13.1%
Montana	\$34,612	\$39,366	13.7%
USA	\$40,144	\$44,765	11.5%

Source: US Bureau of Economic Analysis



HOUSING INDICATORS

IN THIS SECTION...

Home Ownership – The homeownership rate is computed by dividing the number of owner-occupied housing units by the number of occupied housing units or households.

Median Monthly Housing Costs – Median monthly housing costs for occupied housing units are estimated by the American Community Survey.

Housing Units – A housing unit is a house, an apartment, a mobile home, a group of rooms, or a single room that is occupied (or if vacant, is intended for occupancy) as separate living quarters.

HOME OWNERSHIP AND HOUSING UNITS

Housing and home ownership issues were cited numerous times in focus groups and in the BillingsWorks Workforce Survey as a challenge in attracting and retaining talent. Reviewing data available on housing for the community uncovers that homeownership rates are actually on par with the rest of the state and exceed the nation’s home ownership rate. Homeownership in the City of Billings is 5.5 percent lower than for Yellowstone County as a whole suggesting it is either less affordable to own a home within the city, fewer housing units are available, or a combination of both.

With 3,217 vacant housing units, Yellowstone County had a vacancy rate of 5.0 percent in 2013. Among its peer communities (see Appendix C), Yellowstone has the lowest vacancy rate.

Homeownership Rate	2013
City of Billings	63.30%
Yellowstone County	68.80%
Montana	68.30%
USA	64.90%

Source: US Census Bureau

Housing Units in Yellowstone County	2013
Total Housing Units	64,240
Occupied	61,023
Vacant	3,217

Source: American Community Survey, 2013 Five-year Estimates

MONTHLY HOUSING COSTS

When compared to the State of Montana, housing costs are nearly \$100 higher in Yellowstone County (\$94). While this is significant, a review of the monthly housing costs of Billings’ peer communities (see Appendix C) uncovers that Yellowstone County offers lower monthly housing costs than many of its peer cities. Compared with its peers in Montana – Gallatin County and Missoula County – Yellowstone County actually has the lowest median monthly housing costs; median monthly housing costs in Gallatin County and Missoula County are \$968 per month and \$860 per month respectively.

Median Monthly Housing Costs for Occupied Units	2013
Yellowstone County	\$842
Montana	\$748
USA	\$1,012

Source: American Community Survey, 2013 Five-year Estimates



Education Indicators

IN THIS SECTION...

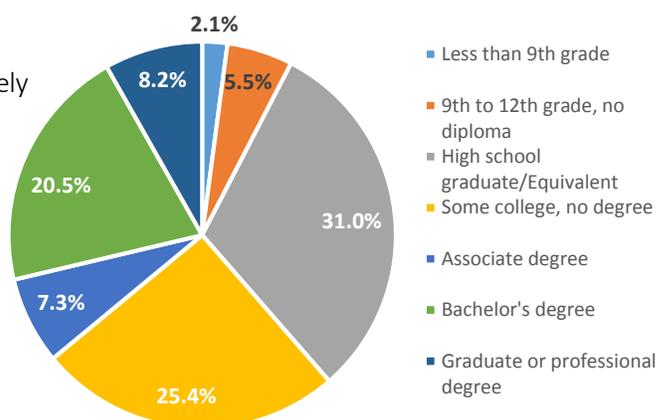
Educational Attainment – This indicator captures the highest degree of education an individual has completed. Educational attainment for the community’s population can be indicative of the general knowledge and skill levels of the talent pool.

High School Graduation – High school graduation rates indicate the success of the K-12 education system and the basic preparedness of young people in the community.

Secondary Career and Technical Education Enrollment – Enrollment data for secondary career and technical education (CTE) is an indicator of career interest and/or career exploration for emerging talent in the community. CTE enrollments serve as a proxy indicator for the long-term talent pipeline; as enrollments in programs aligned to key industry sectors increase, the talent pipeline becomes more robust.

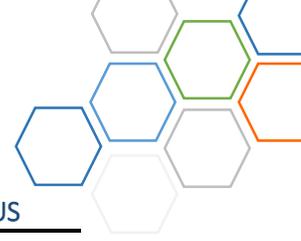
EDUCATIONAL ATTAINMENT

In Yellowstone County, educational attainment closely follows state and national trends. Yellowstone County has a slightly higher percentage of its population whose highest level of education is a high school diploma or the equivalent (31.0 percent) compared to Montana (30.1 percent) and the United States (28.1 percent). Additionally, Yellowstone County narrowly surpasses the state and U.S. in those with a Bachelor’s degree (20.5 percent).



Educational Attainment of the Total Population Over Age 25	Yellowstone	MT	US
Less than 9th grade	2.1%	2.4%	5.9%
9th to 12th grade, no diploma	5.5%	5.5%	8.0%
High school graduate (includes equivalency)	31.0%	30.1%	28.1%
Some college, no degree	25.4%	25.2%	21.2%
Associate degree	7.3%	8.2%	7.8%
Bachelor's degree	20.5%	19.7%	18.0%
Graduate or professional degree	8.2%	8.9%	10.8%
Percent high school graduate or higher	92.3%	92.1%	86.0%
Percent Associate degree or higher	36.0%	36.8%	36.6%
Percent Bachelor's degree or higher	28.7%	28.7%	28.8%

Source: American Community Survey, 2013 Five-year Estimates



Educational Attainment by Age	Yellowstone	MT	US
Population 25 to 34 years			
High school graduate or higher	92.40%	92.50%	87.90%
Bachelor's degree or higher	28.90%	31.10%	31.90%
Population 35 to 44 years			
High school graduate or higher	93.90%	94.50%	87.60%
Bachelor's degree or higher	31.00%	32.90%	32.30%
Population 45 to 64 years			
High school graduate or higher	94.90%	94.00%	87.90%
Bachelor's degree or higher	30.40%	28.30%	28.90%
Population 65 years and over			
High school graduate or higher	86.00%	86.60%	79.00%
Bachelor's degree or higher	23.10%	24.30%	22.30%

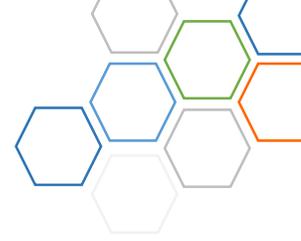
Source: American Community Survey, 2013 Five-year Estimates

HIGH SCHOOL GRADUATION RATE

High school graduation rates for Yellowstone County range from 79.6 percent at Shepherd High School to 100 percent at Broadview High School and Custer High School. Of the nine high schools in Yellowstone County, six schools exceed the graduation rate for the State of Montana.

2013 – 2014 High School Graduation Rate	Enrollment	Rate
Billings Senior High School	1,726	81.2%
Billings West High School	1,883	83.3%
Broadview High School	53	100.0%
Central Catholic High School	331	N/A
Custer High School	27	100.0%
Huntley Project High School	258	92.8%
Laurel High Schools	649	91.9%
Sky View High School	1,535	85.6%
Shepherd High School	254	79.6%
State of Montana		85.4%

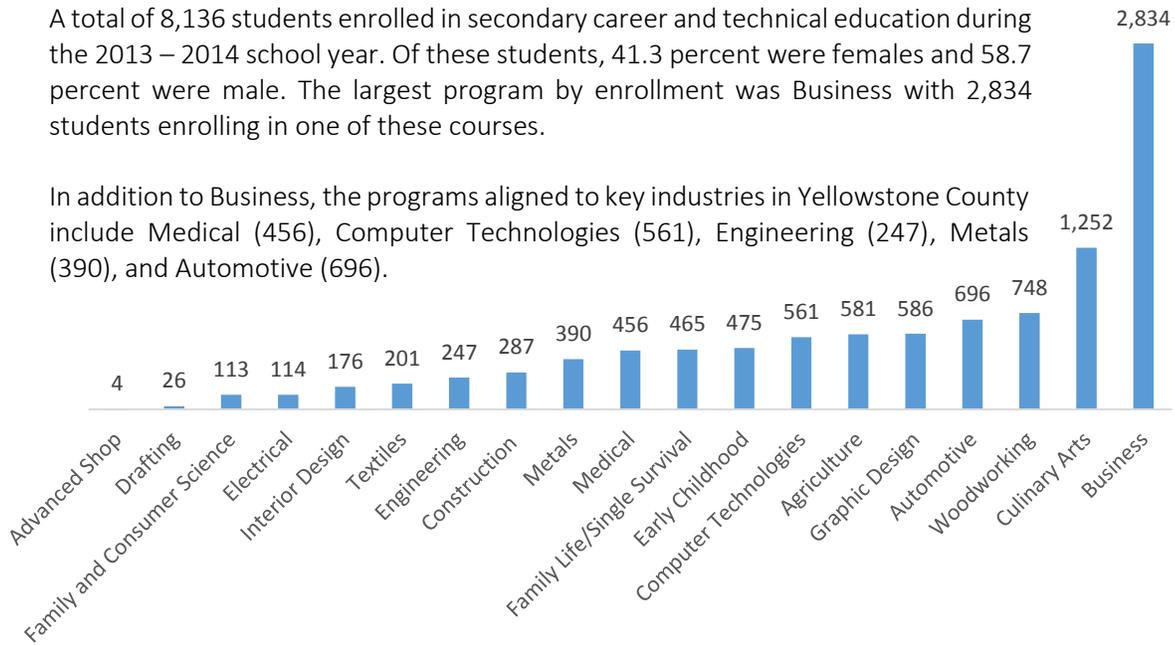
Source: Montana Office of Public Instruction; Billings Central Catholic High School. Note: The graduation rate is not available for Central Catholic High School; the school's website notes that it is near 100%.



K-12 Career and Technical Education Enrollment

A total of 8,136 students enrolled in secondary career and technical education during the 2013 – 2014 school year. Of these students, 41.3 percent were females and 58.7 percent were male. The largest program by enrollment was Business with 2,834 students enrolling in one of these courses.

In addition to Business, the programs aligned to key industries in Yellowstone County include Medical (456), Computer Technologies (561), Engineering (247), Metals (390), and Automotive (696).



2013 – 2014 Enrollment by School	Males	Females	Total
Total Students	4,771	3,365	8,136
Billings Public Schools	3,702	2,621	6,323
Broadview High School	63	30	93
Laurel High School	431	310	741
Shepherd High School	230	195	425
Huntley Project High School	345	209	554

Source: Billings Career Center; Note: Data not available for Custer High School or Central Catholic High School.



Job and Workforce Indicators

IN THIS SECTION...

Employment by Industry – Employment by industry indicates the number of individuals employed in specific industry sectors within Yellowstone’s economy. These data can indicate industry growth trends over time and can inform decision makers about in demand careers and skills.

Average Annual Wage – By reviewing data on the average annual wages offered by specific industry sectors, it is possible to understand the wage dynamics within the Yellowstone County economy. These data are helpful in identifying industries which offer higher wages across all related occupations and which will have the largest impact on economic growth.

Employment by Occupation – Employment by occupation data provides an estimate of occupational concentrations within Yellowstone County’s workforce. These data can be useful in understanding occupational skills sets that are available within the workforce.

Job Orders – The Montana Job Service provides job posting and screening services to local employers. Job orders represent the active job openings that employers have posted with Job Service in Yellowstone County. This serves as a proxy indicator for hiring activity in the area, but does not include job openings that employers may have posted elsewhere.

Employer Reported Indicators – During the focus groups and interviews, employers were asked to identify measures that would indicate progress was being made on the talent gaps in Yellowstone County. These indicators included Overall Quality of the Workforce, Time to Fill Job Postings, Average Number of Qualified Applicants, Improvement in Employee Retention, and the Availability of Employability Skills. The BillingsWorks Workforce Survey was designed to capture data on each of these indicators and will be updated annually.

EMPLOYMENT AND AVERAGE ANNUAL WAGE BY INDUSTRY

In Yellowstone County, Healthcare and Social Assistance (12,584), Retail Trade (10,511), and Accommodation and Food Services (8,497) sectors had the highest employment in 2013.

For all industries, the average annual wage in Yellowstone County was \$41,872.73 dollars compared to \$37,575.92 for all of Montana. The Mining sectors offered the highest average annual wage by far (\$152,383.91), followed by Utilities (\$81,538.01), Management of Companies and Enterprises (\$71,638.81), and Manufacturing (\$61,128.63). Accommodation and Food Service and Arts, Entertainment, and Recreation provided a lower average annual wage (\$16,040.88 and \$16,855.90 respectively).



2013 Employment by Industry

NAICS	Industry	Yellowstone County		Montana	
		Employment	Avg. Annual Wage	Employment	Avg. Annual Wage
	Total Employment	77,558	\$41,872.73	436,773	\$37,575.92
	Total Private Employment	69,094	\$41,158.96	354,708	\$36,500.46
11	Agriculture, Forestry, Fishing & Hunting	295	\$30,717.31	4,848	\$32,721.29
21	Mining	424	\$152,383.91	8,872	\$83,823.46
22	Utilities	323	\$81,538.01	3,174	\$78,667.24
23	Construction	5,025	\$52,180.03	23,922	\$44,889.81
31	Manufacturing	3,330	\$61,128.63	18,338	\$43,824.41
42	Wholesale Trade	5,654	\$53,724.95	17,044	\$50,792.86
44	Retail Trade	10,511	\$28,061.75	55,954	\$25,823.18
48	Transportation and Warehousing	3,077	\$40,417.78	11,893	\$40,809.38
51	Information	1,007	\$44,090.90	6,894	\$44,093.38
52	Finance and Insurance	2,839	\$63,011.88	14,983	\$55,394.99
53	Real Estate and Rental and Leasing	1,101	\$30,327.61	5,270	\$30,434.18
54	Professional and Technical Services	4,514	\$56,679.06	20,056	\$54,486.92
55	Management of Companies and Enterprises	584	\$71,638.81	1,969	\$73,084.94
56	Administrative and Waste Services	3,502	\$26,483.42	17,584	\$28,652.35
61	Educational Services	685	\$26,383.44	4,598	\$25,516.95
62	Health Care and Social Assistance	12,584	\$50,376.34	62,478	\$41,207.44
71	Arts, Entertainment, and Recreation	1,873	\$16,855.90	11,109	\$18,353.77
72	Accommodation and Food Services	8,497	\$16,040.88	48,772	\$15,314.16
81	Other Services (except Public Administration)	3,266	\$26,924.99	16,663	\$25,631.06
	Total Government	8,464	\$47,699.44	82,065	\$42,224.35
	Federal Government	1,690	\$68,860.74	13,046	\$61,628.87
	State Government	1,666	\$40,305.52	23,185	\$43,317.21
	Local Government	5,108	\$43,109.71	45,834	\$36,148.30

Source: Montana Department of Labor and Industry, Labor Market Information



EMPLOYMENT AND WAGES BY OCCUPATION

The largest occupational group in the Billings MSA by employment numbers is Office and Administrative Support Occupations which employs 13,460 individuals or 16.3 percent of the total employment. This is followed by Sales and Related Occupations (10,800), Food Preparation and Serving Related Occupations (9,290), and Healthcare Practitioners and Technical Occupations (6,000).

2013 Employment by Occupation for Billings MSA

SOC	Occupation	Employment	Annual Mean Wage	Hourly Mean Wage
0	Total, All Occupations	82,610	\$40,733	\$19.57
11-0000	Management Occupations	2,720	\$84,990	\$40.86
13-0000	Business and Financial Operations Occupations	3,130	\$61,300	\$29.47
15-0000	Computer and Mathematical Occupations	1,310	\$59,190	\$28.46
17-0000	Architecture and Engineering Occupations	1,660	\$67,760	\$32.58
19-0000	Life, Physical, and Social Science Occupations	570	\$70,120	\$33.71
21-0000	Community and Social Service Occupations	1,930	\$36,810	\$17.70
23-0000	Legal Occupations	620	\$55,290	\$26.58
25-0000	Education, Training, and Library Occupations	3,660	\$45,020	\$21.65
27-0000	Arts, Design, Entertainment, Sports, & Media Occupations	1,190	\$32,960	\$15.85
29-0000	Healthcare Practitioners and Technical Occupations	6,000	\$73,240	\$35.21
31-0000	Healthcare Support Occupations	1,880	\$28,580	\$13.74
33-0000	Protective Service Occupations	1,470	\$38,270	\$18.39
35-0000	Food Preparation and Serving Related Occupations	9,290	\$21,060	\$10.13
37-0000	Building & Grounds Cleaning & Maintenance Occ.	2,920	\$24,670	\$11.86
39-0000	Personal Care and Service Occupations	2,160	\$24,460	\$11.76
41-0000	Sales and Related Occupations	10,800	\$36,240	\$17.42
43-0000	Office and Administrative Support Occupations	13,460	\$32,040	\$15.41
45-0000	Farming, Fishing, and Forestry Occupations	160	\$28,150	\$13.54
47-0000	Construction and Extraction Occupations	4,850	\$45,250	\$21.75
49-0000	Installation, Maintenance, and Repair Occupations	3,840	\$42,280	\$20.32
51-0000	Production Occupations	3,100	\$39,150	\$18.82
53-0000	Transportation and Material Moving Occupations	5,900	\$34,740	\$16.70

Source: Montana Department of Labor & Industry, Research and Analysis Bureau

OCCUPATIONAL PROJECTIONS FOR SOUTH CENTRAL MONTANA

Reviewing occupational projections for the South Central region of Montana⁴ suggests the occupational groups with the greatest growth from 2012 to 2022 will be Office and Administrative Support Occupations (2,264), Food Preparation and Serving Related Occupations (1,856), Construction and Extraction Occupations (1,761), Sales and Related Occupations (1,605), Transportation and Material Moving Occupations (1,287), Healthcare Practitioners and Technical Occupations (1,278), and Installation, Maintenance, and Repair Occupations (788).

⁴The South Central Region of Montana includes Big Horn, Carbon, Fergus, Golden Valley, Judith Basin, Musselshell, Petroleum, Stillwater, Wheatland, and Yellowstone counties.



Occupations with the highest number of annual job openings are Food Preparation and Serving Related Occupations (598) and Office and Administrative Support Occupations (564), and Sales and Related Occupations (548). While these occupations have high annual openings, they provide lower than average wages. On the other hand, Construction and Extraction Occupations (312, \$45,250), Healthcare Practitioners and Technical Occupations (268, \$73,250), and Installation, Maintenance, and Repair Occupations (190, \$42,280) offer high average annual openings *and* higher than average wages.

2012 – 2022 Occupational Projections for the South Central Montana Region

SOC	Occupation	Employment		Change		Average Annual Openings		
		2012	2022	#	%	Growth	Replace	Total
	Total, All Occupations	106,010	123,079	17,069	16.1%	1,734	2,519	4,253
43-0000	Office and Administrative Support Occupations	16,122	18,386	2,264	14.0%	240	324	564
35-0000	Food Preparation and Serving Related Occupations	10,897	12,753	1,856	17.0%	186	412	598
47-0000	Construction and Extraction Occupations	7,720	9,481	1,761	22.8%	176	136	312
41-0000	Sales and Related Occupations	12,959	14,564	1,605	12.4%	170	378	548
53-0000	Transportation and Material Moving Occupations	8,262	9,549	1,287	15.6%	129	175	304
29-0000	Healthcare Practitioners and Technical Occupations	6,720	7,998	1,278	19.0%	128	140	268
49-0000	Installation, Maintenance, and Repair Occupations	4,927	5,715	788	16.0%	80	118	198
13-0000	All Business and Financial Operations Occupations	3,635	4,376	741	20.4%	74	76	150
39-0000	Personal Care and Service Occupations	2,957	3,677	720	24.3%	72	56	128
51-0000	Production Occupations	4,358	5,068	710	16.3%	72	103	175
17-0000	Architecture and Engineering Occupations	2,241	2,897	656	29.3%	66	51	117
11-0000	All Management Occupations	4,208	4,808	600	14.3%	60	86	146
31-0000	Healthcare Support Occupations	2,623	3,102	479	18.3%	48	50	98
37-0000	Building and Grounds Cleaning and Maintenance Occupations	4,389	4,830	441	10.0%	44	88	132
15-0000	Computer and Mathematical Occupations	1,136	1,488	352	31.0%	35	19	54
25-0000	Education, Training, and Library Occupations	4,839	5,181	342	7.1%	34	107	141
21-0000	Community and Social Service Occupations	2,059	2,377	318	15.4%	32	47	79
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	1,920	2,196	276	14.4%	28	47	75
23-0000	Legal Occupations	934	1,158	224	24.0%	22	15	37
19-0000	Life, Physical, and Social Science Occupations	1,027	1,215	188	18.3%	20	33	53
33-0000	Protective Service Occupations	1,578	1,720	142	9.0%	14	44	58
45-0000	Farming, Fishing, and Forestry Occupations	499	540	41	8.2%	4	12	16

Source: Montana Department of Labor & Industry, Research and Analysis Bureau

JOB ORDERS

The Montana Job Service provides job posting and screening services to local employers. Job orders posted through Job Service averaged 1,186 orders per month in 2014 for a total of 14,252. According to anecdotal evidence, job orders within the system may represent approximately 25 percent of job openings in the current labor market.

Job Orders	2014
Total Number of Job Orders	14,252
Average Number of Job Orders per Month	1,186

Source: Montana Job Service



OVERALL QUALITY OF THE WORKFORCE

According to the BillingsWork Workforce Survey, about half of the businesses who responded reported they were confident in the overall quality of the workforce, while the other half cited the opposite opinion. Digging more deeply into workforce quality by industry, the majority of companies in the industries of Energy (7 out of 11); Professional, Scientific, and Technical Services (37 out of 54); and Education (8 out of 10) reported that they are confident with the workforce quality in Yellowstone County. Compared to these three industries, only 2 out of 27 companies in Accommodations and Food Services reported that they are confident in the quality of workforce. Similarly, only one out of seven companies in the Information industry agreed with this statement.

Employer Confidence in the Overall Quality of the Workforce	47%
--	-----

Source: 2015 BillingsWorks Workforce Survey

AVERAGE TIME TO FILL JOB POSTINGS

Among all survey respondents, almost 90% fill vacancies in entry level/ support positions within three months, while only around 60% respondents are able to fill the other three job categories (professional positions, technical positions, and skilled trade positions) within this time frame.

Average Time to Fill Job Postings Over the Last Year	1 day - 45 days	45 days – 3 months	Greater than 3, but less than 4 months	4 months – 6 months	More than 6 months	Not applicable
Entry level/support positions	52%	24%	3%	3%	4%	14%
Skilled trade positions	18%	19%	8%	6%	10%	38%
Technical positions	18%	20%	8%	6%	8%	40%
Professional positions	21%	25%	8%	12%	13%	23%

Source: 2015 BillingsWorks Workforce Survey

AVERAGE NUMBER OF QUALIFIED JOB APPLICANTS

Across all skill levels, the largest percentage of employers saw the average number of qualified job applicants decrease over the last year. Entry-level/support positions experienced the largest decrease; 40 percent of employers who responded to the survey reported a decrease in qualified applicants for this skill level, followed closely by skilled trades positions (36 percent).

Average Number of Qualified Job Applicants Compared to the Previous Year	Increased	Decreased	Remained the same	Not applicable
Entry level/support positions	12%	40%	34%	14%
Skilled trade positions	8%	36%	18%	38%
Technical positions	6%	29%	26%	39%
Professional positions	12%	36%	29%	23%

Source: 2015 BillingsWorks Workforce Survey



EMPLOYEE RETENTION

Employers reported they saw minimal improvements in employee retention over the last year. Professional positions had the highest rate of improvement at 25.6 percent, which entry-level/support positions saw the lowest rate of improvement at 14.3 percent.

Percent of Employers Reporting Improvements to Employee Retention Compared to Previous Year

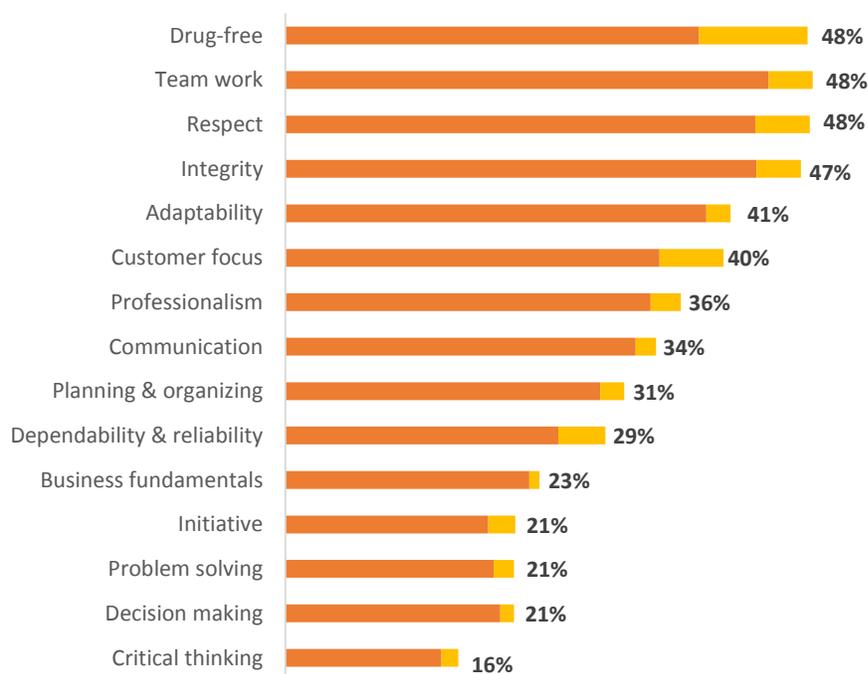
Entry level/support positions	14.3%
Skilled trade positions	13.6%
Technical positions	17.9%
Professional positions	25.6%

Source: 2015 BillingsWorks Workforce Survey

EMPLOYABILITY SKILLS

Survey data suggests employers are experiencing a significant challenge finding employability skills. Half of the survey respondents stated that they had problems in finding candidates in almost each of the following employability skills, except drug-free and team work. **The top 3 hard-to-fill employability skills are critical thinking, initiative, and problem solving.**

Percent of Employers Reporting EASY + VERY EASY to find Employability Skills



Source: 2015 BillingsWorks Workforce Survey

Note: Employability skills sourced from the Common Employability Skills framework developed by the National Network of Business and Industry Associations. The full list of skills can be found at

http://businessroundtable.org/sites/default/files/Common%20Employability_asingle_fm.pdf.

BillingsWorks Workforce Council Action Plan



BillingsWorks Workforce Council Mission

Cooperatively identify workforce issues, establish goals, develop and implement strategies, and monitor outcomes to address near and long-term workforce needs to achieve our 2023 workforce vision.

BillingsWorks Workforce Council Vision

We will be the premier business-driven workforce development hub in our economic development region⁵ by 2023.

FOUR STRATEGIC GOALS

- GOAL 1:** Position the BillingsWorks Workforce Council as the tool for collaboration, accountability, and reporting related to workforce needs and as the go-to resource for workforce development information, coordination, and connections
- GOAL 2:** Address the immediate and sector-specific talent development and talent attraction needs of Yellowstone County businesses
- GOAL 3:** Ensure the alignment of our post-secondary education, career and technical education, and K-12 education and training systems with current and future workforce demand
- GOAL 4:** Develop a talent attraction campaign that promotes the benefits of living and working in Billings and Yellowstone County

STRATEGIC IMPERATIVE

Develop and implement a vision for the strategic quality of place investments for Yellowstone County that supports talent attraction and talent retention in the community

⁵Defined as Colorado, Idaho, Montana, North Dakota, South Dakota, eastern Washington, and Wyoming



GOAL 1: Position the BillingsWorks Workforce Council as the tool for collaboration, accountability, and reporting related to workforce needs and as the go-to resource for workforce development information, coordination, and connections

BillingsWorks represents a great network of system partners and resources that can *collectively* address most talent development needs identified by business and industry. As a one-stop shop for the myriad of resources, programs, and services, BillingsWorks offers employers and community leaders an efficient way of tapping into the broad spectrum of talent development information and resources. It is important to note, however, that BillingsWorks does not duplicate services or resources, but rather exists to complement and connect partners within the system.

This role as the community’s “go-to” resource for talent development information and resources needs to be consistently and proactively promoted to state and local officials, businesses, and the community at large. But, maintaining and promoting the network of partners and supporting its key initiatives is no small task. It will require clear organization and dedicated staff in order to be successful.

Strategy 1.1 Clarify roles and responsibilities among BillingsWorks members and partner organizations

- Identify the level of commitment from different organizations including commitments of time, in-kind resources, and financial support
- Execute a Memorandum of Understanding among BillingsWorks partners that outlines roles and responsibilities of each partner organization

Strategy 1.2 Establish BillingsWorks as the voice for talent development information and issues

- Develop a responsive BillingsWorks website that serves as a go-to source for talent development information, connections, and resources
- Promote BillingsWorks and its mission to new businesses, partners and community organizations, local elected officials, and individuals

Strategy 1.3 Advocate for talent development opportunities and issues within the community

- Collect, compile, and disseminate data and intelligence to inform decision making and policy at the local, state, and federal level
 - Conduct the annual BillingsWorks Workforce Survey to gather intelligence on key talent development issues
 - Compile the annual State of the Workforce report to monitor trends and progress on workforce indicators
- Develop an advocacy agenda which outlines BillingsWorks’ key messages and target audiences including, but not limited to:
 - State higher education officials – to encourage key investments into higher education within Yellowstone County aligned with industry needs
 - Montana State Workforce Investment Board and the Montana Department of Labor and Industry – to position BillingsWorks as the regional convener and planning entity for local workforce development efforts in alignment with the Workforce Investment and Opportunity Act (WIOA)



- Local elected officials – to secure their support and leadership for BillingsWorks goals and strategies, particularly related to the strategic imperative to strengthen quality of place
- Area businesses and industry associations – to encourage their participation with BillingsWorks’ efforts

Strategy 1.4 Formalize BillingsWorks organizational structure including the staffing and resource development plan

- Develop a sub-committee structure aligned to BillingsWorks five strategic goals including champions and/or co-champions for each sub-committee
- Secure a full-time staff person to direct BillingsWorks efforts, coordinate resources, and monitor success
- Develop a resource development plan that explores:
 - Potential federal and state grant opportunities for talent development including the Workforce Innovation and Opportunity Act
 - Private investments from Yellowstone County businesses for special initiatives
 - Leveraged resources from BillingsWorks member organizations



Goal 2: Address the immediate and sector-specific talent development and talent attraction needs of Yellowstone County businesses

Businesses in Yellowstone County currently have significant talent needs that require immediate attention. While long-term strategies are important for future growth and vitality in the community, the ability of BillingsWorks to address companies' immediate needs will ensure they remain competitive and poised for growth. Therefore, a mechanism to address these immediate talent needs is necessary.

BillingsWorks has a successful model – WorkNow Resource Teams – to build upon as it responds to employers' short-term needs. In the WorkNow Resource Team model, subject matter experts come together to provide a rapid and comprehensive solution for the business that leverages any and all resources that are available from community partners and programs. These WorkNow Resource Teams come together to identify solutions at no cost to the employer. The WorkNow model has demonstrated success with Burlington Northern Santa Fe Railway and has also been used to facilitate sector-specific dialogues among the Retail and Hospitality industry.

Furthermore, one of the greatest assets BillingsWorks offers to businesses and the community is its network of partners. There are few, if any, pieces of the talent development system that are not connected to the BillingsWorks Workforce Council and its members. These formal and informal connections are an important element in addressing employers' immediate needs. A mechanism or systematic way of sharing information about workforce needs will facilitate efficient solutions that build on all members' knowledge, resources, and networks.

Strategy 2.1 Expand the WorkNow model to other sectors and to include additional partners that can provide access to services or new talent pools

- Review successful WorkNow experiences and define key steps and processes
- Establish WorkNow resource teams for target industries that are ready to respond as needs arise
- Provide training to all members of the WorkNow teams based on the steps and processes defined through previous WorkNow successes
- Map existing resources and services to tap into as immediate business needs arise to increase team member awareness of partners' services and resources

Strategy 2.2 Secure tools and/or technology to equip BillingsWorks and Yellowstone County's talent development system to provide immediate solutions for businesses' workforce needs

- Create an information sharing mechanism and protocols to leverage the network of BillingsWorks partners to connect job seekers to employment opportunities
- Research and secure software to identify transferrable skills sets among existing talent to broaden the pool of talent available for Yellowstone County businesses



GOAL 3: Ensure the alignment of our higher education, career and technical education, and K-12 education and training systems with current and future workforce demand

Billings' education and training partners are the community's greatest asset in addressing the long-term needs of business and industry. It is imperative, then, that the programs and curricula offered at these institutions are aligned to current and future workforce demand. As the go-to resource for workforce development information, BillingsWorks will have access to the latest and most in depth intelligence of the workforce needs. This information will be invaluable to the community's education and training providers in developing curriculum, launching new programs, and helping their students prepare for and transition to careers. For example, the training analysis conducted as part of this report found specific training and education gaps for healthcare, IT, and skilled trades positions.

BillingsWorks Workforce Council envisions a state-of-the-art campus for a Career & Talent Academy that promotes synergy among K-12 education, post-secondary education, and adult worker training. The Career & Talent Academy will provide a joint campus for the Billings Career Center, City College, and potentially other community partners such as Job Service or adult education providers.

The Career & Talent Academy will allow students to earn a high school diploma, industry-recognized credentials, and an Associate's degree in one location. Further, articulation agreements and dual-credit opportunities will be available to facilitate a seamless transition from K-12 to post-secondary education. This will help individuals accelerate their pathway into careers by eliminating remedial coursework and ensuring all credits align to credentials and/or degrees. Businesses will be engaged to develop industry-specific curriculum that aligns directly with their skill needs and emerging technologies.

Just as students sometimes face challenges transitioning from secondary to postsecondary education and training, the transition from school to work can also be challenging. Work-and-learn opportunities help to smooth a student's connection to the labor market and address a number of opportunities and challenges identified in the State of the Workforce report. They provide career exposure and awareness to emerging talent, allow young people to develop employability skills, connect businesses and talent for future employment opportunities, and provide a mechanism for technical and industry-specific skill development. For these reasons, a "work-and-learn hub" will facilitate more linkages among employers, individuals, and community partners and will result in an increase in meaningful work-and-learn opportunities.

Strategy 3.1 Gather and share information to support Yellowstone County's universities, career and technical education providers, and K-12 systems to align with workforce demand and skill needs

- Host quarterly "sector partnership" meetings to gather information about skill gaps, workforce trends, and future education/training needs to inform all levels of education
- With insights from the annual BillingsWorks Workforce Survey and ongoing "sector partnership" meetings, update the Billings training profile and gap analysis annually to identify new or updated degree/certificate programs needed
- Provide a semi-annual briefing to the community's post-secondary education, K-12, and adult education on the latest workforce intelligence, industry trends, and program needs



- Working with education and training providers, identify the advocacy, funding, and/or programmatic support that is needed to align programs at the following education levels:
 - Bachelor degrees and above;
 - Associate degrees;
 - Career and technical education and industry recognized credentials; and
 - Foundational academic and employability skills.

Strategy 3.2 Establish a campus for a Career & Talent Academy that promotes synergy among City College, Career Center, and state and private sector partners and accelerate the talent pipeline

- Define the program(s) to be offered at the Career & Talent Academy campus
 - Align Billings Career Center and City College programs toward Big Sky Pathways and future program ideas to be offered at the Career & Talent Academy considering:
 - Dual credits and articulations agreements available to accelerate completion
 - Industry-recognized credentials and/or degrees earned along the career paths
 - Industry engagement throughout all levels of curriculum design and implementation (i.e. employers should inform the curriculum *and* participate in implementation by providing work-and-learn opportunities or in-classroom engagements)
 - Embedded work-and-learn opportunities for all students of the Career & Talent Academy (*see Strategy 3.3*)
 - Identify ways to link elementary and middle schools to the Career & Talent Academy for early exposure to career paths and to promote the Career & Talent Academy as a “cool” place to launch their future careers
- Conduct due diligence into the feasibility of establishing a campus for the Career & Talent Academy
 - Research best practices from other communities that have similar academy models
 - With the programs defined, determine the physical infrastructure that will be needed for the Career & Talent Academy including facility renderings and equipment needs for a joint campus facility(ies)

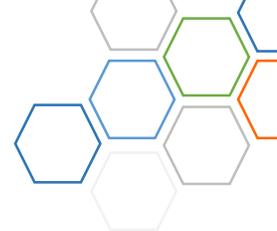
PROMISING MODELS TO CONSIDER

Clark County Career and Technical Academy (NV)

Clark County School District Career and Technical Academies (CTA) offer learning opportunities related to various themes for interested students to improve student achievement, promote diversity, and create an awareness of career opportunities. There are two types of CTE Assessments in Nevada. The Workplace Readiness Skills Assessment measures student proficiency in the Employability Skills for Career Readiness state standards. The End-of-Program Technical Assessments are program specific and measure the skill attainment of students who have completed a program course sequence

North Carolina’s Early College High Schools

North Carolina’s early college high schools are changing the future — for the students who graduate well-prepared and for a state that needs a well-educated workforce like never before. Typically located on the campus of a two- or four-year college or university, these innovative schools aim to graduate students who earn a high school diploma as well as two years of transferable college credit or an associate degree — all at no cost to their families. The target population for early colleges is first-generation college-goers, those at-risk of dropping out or other historically underserved populations.



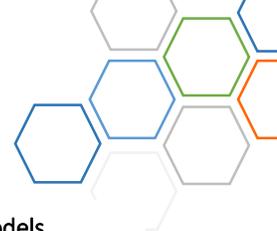
- Develop a cost estimate and the return-on-investment (ROI) for the community
 - Identify potential sources of funding for the Career & Talent Academy campus
- Garner community buy-in from education partners, local and state officials, business and industry, and the community at-large
 - Conduct outreach to local companies to understand their willingness to engage with the Career & Talent Academy and hire from this new talent pool for entry-level career opportunities
 - Secure support from community organizations and partners from tribal communities, local unions, industry associations, and community-based organizations

Strategy 3.3 Advocate for local education and training programs that align with Yellowstone County's workforce demands

- Utilizing information gathered through Strategy 3.1, advocate to the Montana State University system and the Office of the Commissioner of Higher Education for new and/or updated programs identified through the annual gap analysis. Immediately, pursue the development of the Associate of Science in Nursing (ASN) to Bachelor of Science in Nursing (BSN) completion program at Montana State University – Billings.
- Once the Career & Talent Academy program(s) is defined, meet with the Montana Office of Public Instruction, Montana State University System, and Rocky Mountain College to present plans and seek policy, financial, and/or implementation support
- Outreach to local elected officials from Yellowstone County and the City of Billings to endorse and potentially provide funding for the Career & Talent Academy campus

Strategy 3.4 Provide a “work-and-learn hub” that links employers, individuals, and schools for smooth work-and-learn connections that increase career awareness and connect emerging talent to career opportunities in Yellowstone County

- Build a specialized work-and-learn page within the BillingsWorks website that facilitates connections among businesses, emerging talent, and schools focused on work-and-learn opportunities that increase career awareness.
 - The “work-and-learn hub” will provide the following functionality:
 - Employers can post/advertise work-and-learn opportunities;
 - Individuals can research work-and-learn opportunities well-suited for their career interests and access information about how to apply and/or participate in these work-and-learn opportunities; and
 - Schools and community-partners can identify ways for business and industry to become involved in the classroom and/or access resources to support their work-and-learn opportunities.
 - Establish a commitment from MSU – Billings, Rocky Mountain College, and Billings Career Center to jointly support and utilize the “work-and-learn hub”
 - Promote the “work-and-learn hub” to the business community, individuals, and all education stakeholders



- Embed employability skill development into all work-and-learn models provided in Yellowstone County
 - Leverage the National Network of Business and Industry Association’s Common Employability Skills framework to establish a common definition of “employability” among all sector
 - Enhance learning occurring during work-and-learn experiences by embedding the Common Employability Skills standards in training plans, resources for employers, and by providing best practices via the “work-and-learn hub.” The standards are currently being developed and are expected to be released in Spring 2015.
- Provide resources for employers to develop work-and-learn opportunities at their companies
 - Define work-and-learn models that facilitate career awareness and develop connections between young people and employers in the Billings community. These may include, but are not limited to:
 - Short-term externships and job shadowing experiences;
 - Internships;
 - Co-operative education;
 - Pre-apprenticeships;
 - Apprenticeships; and
 - On-the-job training.
 - Develop an employer toolkit that outlines the steps to launch the work-and-learn model(s) that best-suits their objectives and capacities
 - Provide technical assistance to businesses that are launching work-and-learn opportunities via the “work-and-learn hub.” This may include one-on-one coaching for businesses, templates for job descriptions and/or training plans, or videos and webinars on attracting and working with emerging talent.

Various Work-and-Learn Models

Many stakeholders are familiar with the internship model, but there are a number of different work-and-learn models that help employers and individuals meet their objectives. The different models can range from short-term externships to multi-year approaches.

Externship - Externships are short-term in nature and aimed at career exploration. These can include one-day job shadowing experiences or spending up to a few weeks with a company.

Internship - Interns work at a company for a limited period of time for career exploration and experience, skill development, and networking.

Cooperative Education - Co-ops provide occupational preparation, with classroom-based education and work experience.

On-the-job Training (OJT) - OJT is individualized training at a job site aimed at increasing employee skills.

Clinical Training - tied to occupational study and worksite training with an examination often required for licensure.

Pre-Apprenticeship – part-time apprenticeship programs through school-based and work-based learning focused on career counseling, occupational and academic instruction.

Apprenticeship - on-the-job training with accompanying study for a trade/profession resulting in a national industry certification with wage increases along the way.



GOAL 4: Launch a talent attraction campaign that promotes the benefits of living and working in Billings and Yellowstone County

The State of the Workforce findings established that the talent pool is shallow in Yellowstone County. It is imperative, then, that Billings and Yellowstone County launch a proactive talent attraction strategy to encourage highly-skilled individuals to move to Billings and bring their talents to the community.

From focus groups and interviews during the strategic planning process, it became clear that individual businesses are already conducting on-going talent recruitment efforts targeted toward individuals not just outside of Yellowstone County, but also targeted toward talent outside of Montana. A collective talent attraction strategy will support these efforts which, over time, will decrease the cost to individual employers and increase the volume of skilled talent available to them.

Strategy 4.1 Develop the content and key messages of the talent attraction campaign

- Determine the target audiences and key messages/reasons for locating in Billings/Yellowstone County for each
- Brand the talent attraction campaign to be appealing to target audiences and to ensure consistent promotion by all stakeholders
- Determine the marketing and promotional plan for the talent attraction campaign considering:
 - Opportunities to disseminate information to key audiences (i.e. original Montanans looking to return home, specific skill sets/industry experience, etc.)
 - Opportunities to share information to visitors and tourists
 - Opportunities to leverage social media

Strategy 4.2 Launch an online talent attraction site that promotes the benefits of living and working in Billings/Yellowstone County

- Research best practices from other communities such as Boise Valley, ID (growideashere.com) and West Michigan (hellowestmichigan.com)
- Secure design and development expertise to develop and launch the site
- In the site, include linkages to real-time job opportunities available in Yellowstone County

BOISE, IDAHO: “BIG IDEAS GROW HERE”

<http://GrowIdeasHere.com/>

Big Ideas Grow Here is a dynamic website launched by the Boise Valley Economic Partnership that spotlights the people, places, and potential in the Boise Valley. Big Ideas Grow Here features video vignettes of those living and working in the Boise Valley and the tech industry. The site features a day in the life of six individuals who represent the technology community in the Valley. The website serves as a recruitment tool for companies looking to bring more talent to the valley.

Boise Valley Economic Partnership, Idaho Commerce, Idaho Department of Labor, and many Valley tech companies collaborated to develop a site that would help to retain and recruit talented individuals to the area.

In addition to videos and spotlight stories, the site also provides an overview of the Boise Valley’s top industry sectors and links directly to real-time career opportunities available through the Idaho Department of Labor tools.

Boise Valley Economic Partnership received a Gold Excellence in Economic Development Award in 2014 for the project from the International Economic Development Council.



Strategy 4.3 Develop a Toolkit for Talent Attraction that all stakeholders, but particularly businesses, can use when recruiting talent to Yellowstone County

- Determine the resources and supportive materials/services that are most needed by employers as they recruit talent from outside the county
- Develop collateral materials in both print and electronic format for all stakeholders to utilize when promoting Billings and Yellowstone County
- Share these resources with businesses, local elected officials, education providers, business and industry groups, chamber of commerce, and other stakeholders to encourage wide dissemination



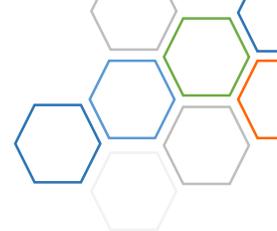
COMMUNITY STRATEGIC IMPERATIVE: Develop and implement a vision for the strategic quality of place investments for Yellowstone County that supports talent attraction and talent retention in the community

The BillingsWorks survey and focus groups confirmed that the talent pool within the Yellowstone County is very shallow. It is imperative, then, that the community is an attractive place to live and work so new talent will relocate to the area and so that existing talent is retained in the community. Investments into a quality of place strategy will position the Billings community for private investment in the future and long-term growth.

A community-wide quality of place strategy is imperative for the overall growth of the City of Billings and Yellowstone County. BillingsWorks strongly and urgently encourages that a quality of place strategy be developed, but also recognizes that a successful strategy will require community-wide buy-in and participation. While BillingsWorks intends to be an active partner in the quality of place strategy, the Council encourages leadership from the City of Billings, Yellowstone County, the Billings Chamber of Commerce, and the Downtown Business Association to lead the development of a comprehensive plan to strengthen quality of place in Yellowstone County.

In doing so, BillingsWorks offers the following activities for consideration:

- Establish a collective vision for local quality of place strategies and investments that is shared by the City of Billings, Yellowstone County, Billings Chamber of Commerce, Big Sky Economic Development, and BillingsWorks
 - Collect input from multiple stakeholder groups to inform the quality of place strategy which include, but are not limited to:
 - Youth
 - Young professionals
 - Households with children
 - Established workers and retirees
 - Identify quality of place projects/initiatives to address infrastructure, housing, and cultural, civic and recreational amenities and realize the collective vision
- Organize for implementation of the quality of place strategy
 - Name an organization and/or individual to serve as the champion for each quality of place initiative/project as well as a small leadership team as needed
 - Identify a funding strategy for each quality of place initiative/project
 - Identify quality of place indicators to measure progress
- Craft a marketing and communications plan to share the collective vision for quality of place with both internal and external stakeholders
 - Brand Billings' quality of place so it is consistently communicated in talent attraction and retention efforts
 - Identify audiences and key messages related to the quality of place initiatives/projects to maintain community buy-in, promote improvements, and/or attract talent to the community



MEASURING SUCCESS

The talent dashboard and workforce indicators included in the State of the Workforce Report provide long-term metrics of success for this plan. In the short-term, several indicators will signify to BillingsWorks that its goals and strategies are indeed having the desired effects. *Note: These are draft indicators and will be finalized with input from the BillingsWorks Workforce Council.*

Short-term Metrics for Success	Current	2018 Target
Increase the overall confidence in the workforce	47%	TBD
Increase the average number of qualified job applicants		
Entry-level/support positions	14%	TBD
Skilled trade positions	13%	TBD
Technical positions	11%	TBD
Professional positions	15%	TBD
Increase availability of employability skills		
Critical thinking	16%	TBD
Team work	48%	TBD
Communication	34%	TBD
Respect	48%	TBD
Integrity	47%	TBD
Initiative	21%	TBD
Dependability	29%	TBD
Adaptability	41%	TBD
Professionalism	36%	TBD
Planning and organizing	31%	TBD
Problem solving	21%	TBD
Decision making	21%	TBD
Customer focus	40%	TBD
Business fundamentals	23%	TBD
Drug-free	48%	TBD
Increase the population aged 25 – 65 in the community	79,971	TBD
Increase educational attainment: Associate degree or higher	36.0%	TBD

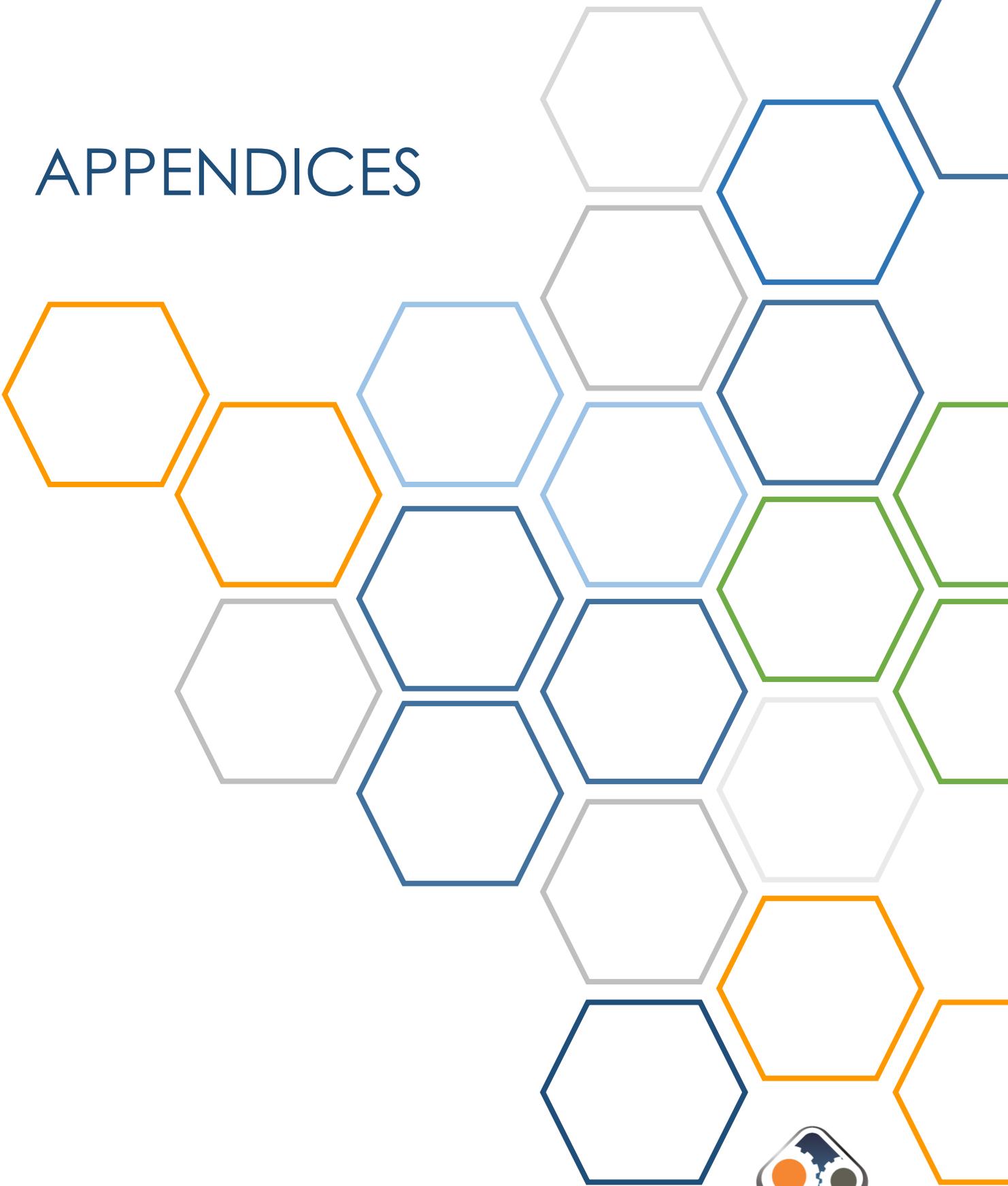
Immediately upon adopting the State of the Workforce Report and BillingsWorks Action Plan, the BillingsWorks Workforce Council will set 2018 targets for the metrics outlined above. While several of the goals and strategies included in the action plan will be implemented over several years, the short-term and mid-term strategies will still have an impact on these workforce indicators. By 2018, BillingsWorks will be at the mid-point in its original vision to be the premier business-driven workforce hub in the region by 2023 and incremental progress should be seen.



Call to Action

While the development of this State of the Workforce Report and BillingsWorks Workforce Council's Action Plan is complete, the real work for BillingsWorks and its partners is just beginning. In order to see progress on the workforce indicators included herein, all stakeholders in the community must immediately band together, roll up their sleeves, and get to work. BillingsWorks recognizes that, in addition to its workforce development, economic development, and education partners, the goals and strategies outlined in the pages above will require active participation and support from local elected officials, business owners, community-based organizations, and all citizens within the Billings community. With a plan in place to guide its work, BillingsWorks looks to engage everyone in developing a highly-skilled workforce.

APPENDICES



BillingsWorks
Workforce Council

2015

APPENDIX A: BILLINGSWORKS WORKFORCE SURVEY RESULTS AND ANALYSIS

2015



BillingsWorks
Workforce Council



BillingsWorks Workforce Survey Results and Analysis

As part of the BillingsWorks workforce planning and analysis process, over three thousand businesses in BillingsWorks service region were surveyed to gather insights on workforce development challenges and opportunities. The survey was developed by Thomas P. Miller and Associates, LLC (TPMA) in collaboration with BillingsWorks. A total of 363 respondents completed the sixteen question survey between January 5 and February 5, 2015. The information provided in this document is based on response data compiled in January and February 2015. This is the most recent workforce development feedback available.

The survey aimed to inform the BillingsWorks Workforce Council by identifying trends in workforce supply and demand from a business perspective and provide participating companies with richer information in order to better plan for talent attraction and retention.

Questions focused on the following three areas:

1. **Workforce availability and quality** - average time to fill job postings by job categories, average number of qualified job applicants by job categories, skill availability (including knowledge, technical skills, and employability skills)
2. **Barriers to workforce attraction and retention**
3. **Alignment of education providers and workforce needs**

Key findings include:

Workforce Availability and Quality

- **A lack of available workers negatively impacts business in Billings** - nearly 7 in 10 employers felt it hinders business growth.
- **Employers have mixed feelings about workforce quality.** Half of those who responded are confident in the overall quality of the workforce, while the other reported the opposite position.
- **Employers also find it difficult to find candidates with industry-specific technical skills and preferred credentials.** General skills (such as reading, writing, and mathematics) were reported as relatively easy to find.
- **Survey data suggested an even bigger challenge is finding candidates with employability skills,** compared to technical skills. Half of survey respondents stated they had problems finding candidates in almost all of the example employability skills,⁶ but they have the most difficulty finding candidates with sufficient critical thinking, initiative, and problem solving skills.
- **Skilled trade and technical positions have the lowest workforce availability and longest recruitment times.** Entry-level/support positions offer the best workforce availability and shortest recruitment times, followed by professional positions. (*See insert on the next page for definitions of positions.*)

Attraction and Extension

- **Professional positions showed the biggest improvement in talent attraction and retention** from 2013 to 2014.

⁶ Employability skills include critical thinking, team work, communication, respect, integrity, initiative, dependability & reliability, adaptability, professionalism, planning & organizing, problem solving, decision making, customer focus, business fundamentals, and drug-free.



- **The greatest barrier reported in the survey is pay** (with over 70% of respondent ranking pay as one of their top three barriers), followed by benefit (41%), job opportunities (37%), and housing (29%).

Education Providers

- **Employers are confident in the quality of postsecondary education in Yellowstone County but report less confidence in secondary institutions.** Nearly half of all businesses who responded rated highly the quality of three education and training providers: Rocky Mountain College, MSU-Billings, and City College at MSU-Billings. Area High Schools received over 40% positive feedback; however, it also received the highest rate (over 20%) of negative feedback.

Based on these data, it is recommended that BillingsWorks do the following:

1. **Focus on employability skills, technical skills, and certifications.** This may need to include a campaign to educate employers about the value and content of certifications.
2. **Include K-12 education in workforce strategies** to create a more sustainable pipeline of talent ready to enter jobs or postsecondary education upon graduation.
3. **Continue to monitor perceptions of workforce quality at different skill levels,** and understand what the entire talent development system (including employers) is doing to improve quality.
4. Because entry- and support-level workers are easiest to find, **identify career pathway options to move promising entry- and support-level workers into skilled, technical, and professional positions.** This may include working with employers to identify internal career pathways and working with education and training providers to develop stacked and latticed credentials that employers recognize for career advancement.
5. **Actively market BillingsWorks' efforts** to stay connected to the 70% of employers who reported the possibility of hiring in the next year.
6. **Training gap and themes out of the suggested trainings**

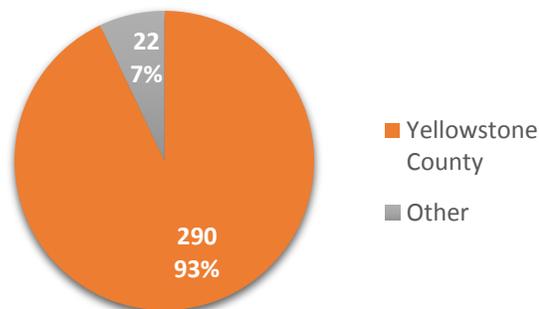


Survey Results

Organizations by County

Over 90% of the 363 respondents came from Yellowstone County. The other location included Carbon County, Stillwater County, Mussel Shell County, Big Horn County, and more.

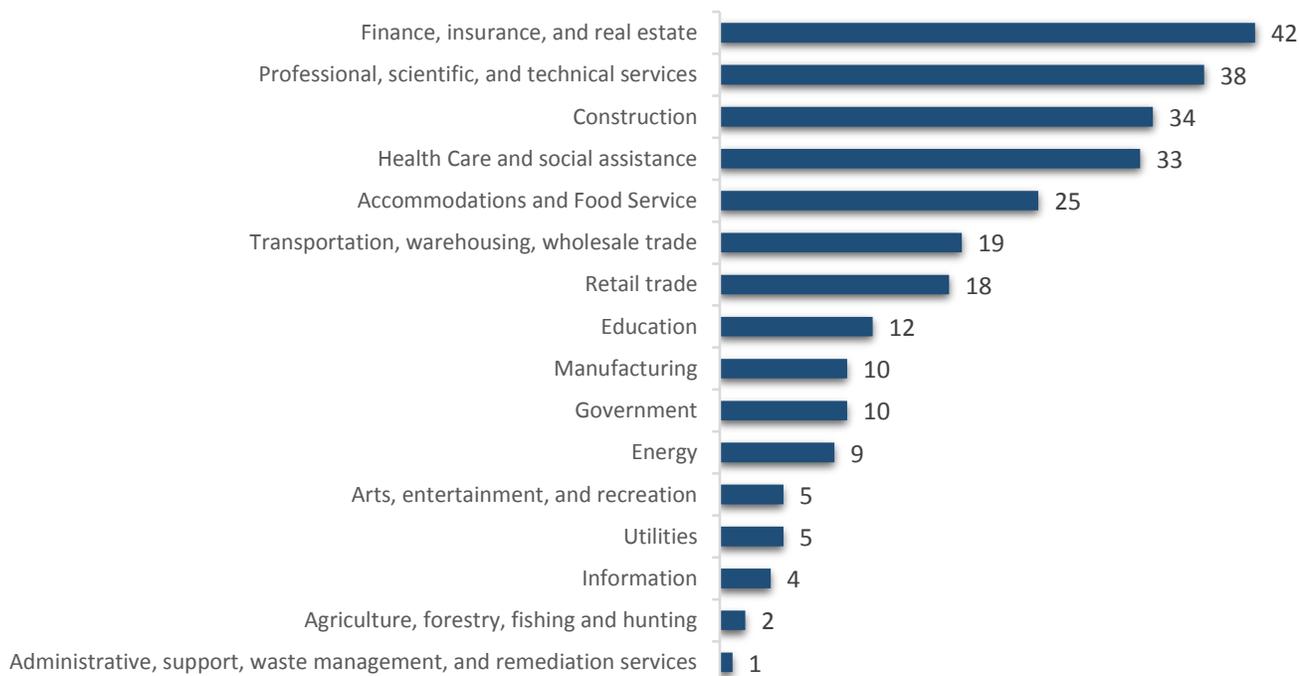
Where is your company located?

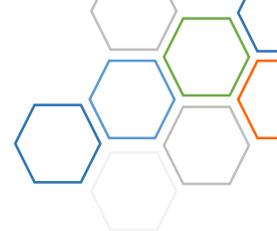


Organizations by Industry

The Finance, Insurance, and Real Estate industry offered the most responses to the survey, with 42 organizations responding. The other large industry groups with a high number of responses included Professional, scientific, and technical services (38); Construction (34); Health Care and social assistance (33). Organizations that selected “other” (96) included firms in automotive, commercial service, architecture, and more (not shown in the figure).

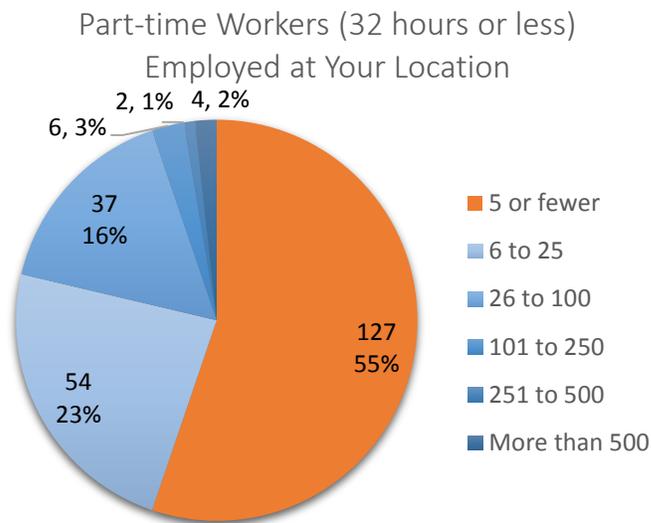
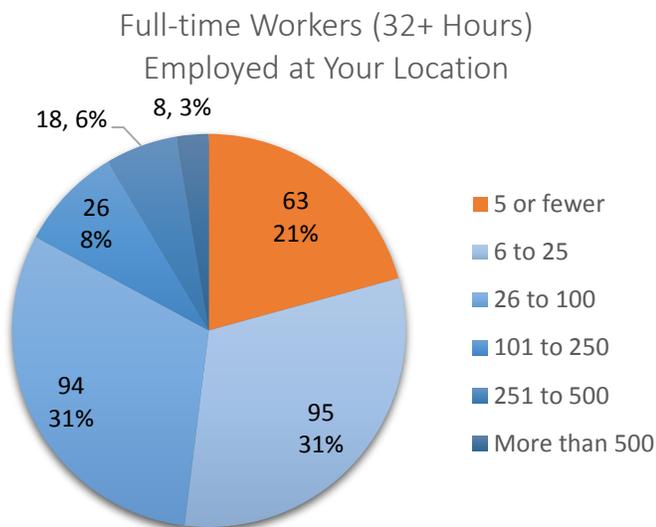
What industry do you represent?





Responding Organizations by Number of Employees

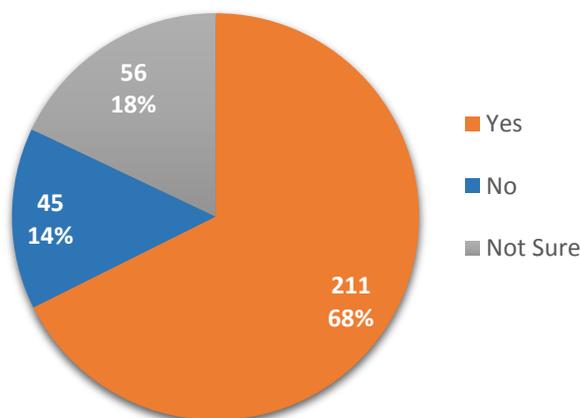
The tables below summarize the size of organizations that responded to the survey. More than half of the respondents reported having 25 or fewer full-time employees or part-time employees.



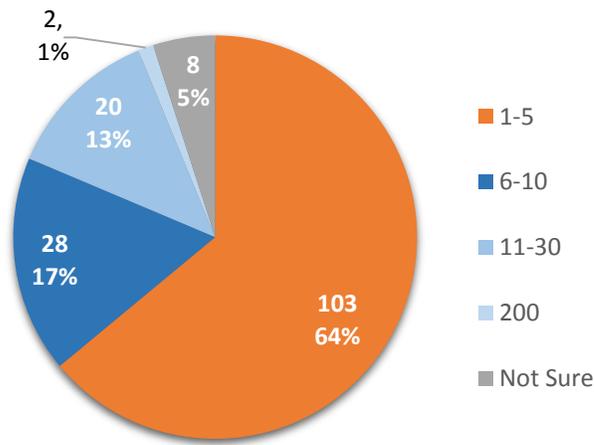
Responding Organizations by Hiring Projections

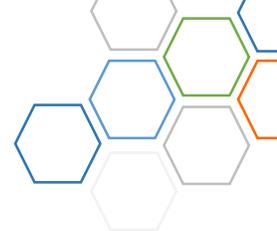
The majority (211, 68%) of respondents to this question reported considering hiring new employees in the next year. Among the 211 respondents that have the hiring plans, 103 companies (64%) plan to hire 1-5 employees. Taking midpoint of ranges, it is estimated that respondents project to hire over 1,000 new workers in total if there is an adequate supply of talent available. The growth of 1,000 job opportunities will likely lead to an increase of \$41.9 Million in annual earning estimated based on annual average wage in Yellowstone County (\$41,872.73).

In the next year, is your business considering hiring new employees due to growth?



If yes, how many new employees do you plan to hire?



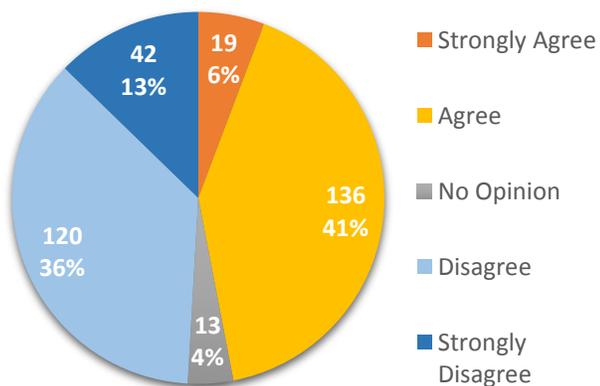


Overall Workforce Quality and Availability

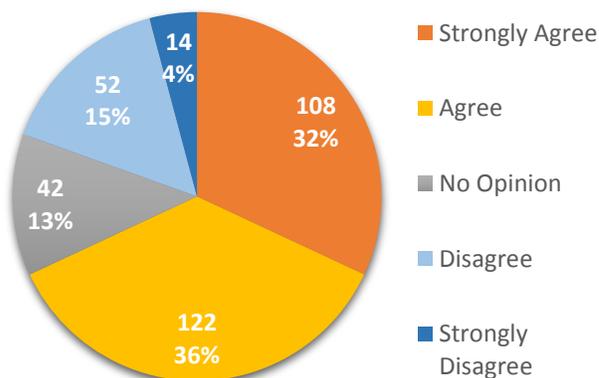
About half of the businesses reported that they were confident in the overall quality of the workforce, while the other half cited the opposite opinion. Digging more deeply into workforce quality by industry, the majority of companies in the industries of Energy (7 out of 11); Professional, Scientific, and Technical Services (37 out of 54); and Education (8 out of 10) reported that they are confident with the workforce quality in Yellowstone County. Compared to these three industries, only 2 out of 27 companies in Accommodations and Food Services reported that they are confident in the quality of workforce. Similarly, only one out of 7 companies in Information industry agreed this statement.

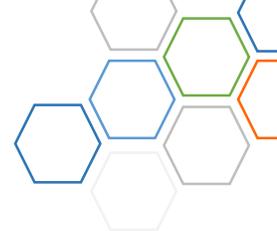
Regarding workforce availability, almost 70% of survey respondents stated that the lack of available workers negatively impact their business growth. Consistent with the responses to last question, the majority of companies in Accommodations and Food Services (22 out of 28) as well as Information (7 out of 7) reported the concern in the lack of available workers. It is worth noticing that around half of the companies in Professional, Scientific, and Technical Services (28 out of 56) and Education (9 out of 14) reported the lack of available workforce even when the majority of the companies in these two industries showed confidence in the workforce quality in last question.

I am confident in the overall quality of the workforce in Yellowstone County.



A lack of available workers negatively impacts my ability to grow my business in Yellowstone County.





Skill Availability

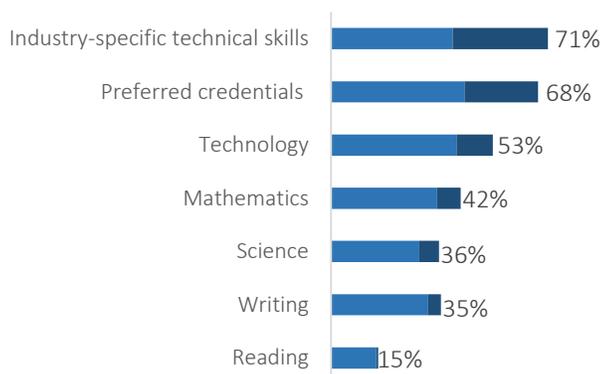
Among knowledge and technical skills, general skills (such as reading, writing, and mathematics) were reported as relatively easy to find, while specific skills (such as industry-specific technical skills and preferred credentials) were stated by majority of respondents as difficult to find candidates.⁷

Compared to technical skills, survey data suggested a bigger challenge in employability skills. Half of the survey respondents stated that they had problems in finding candidates in almost each of the following employability skills, except drug-free and team work. The top 3 hard-to-fill employability skills are critical thinking, initiative, and problem solving.

Knowledge and Technical Skills:

Please rate how difficult it is to find candidates with the following skills.

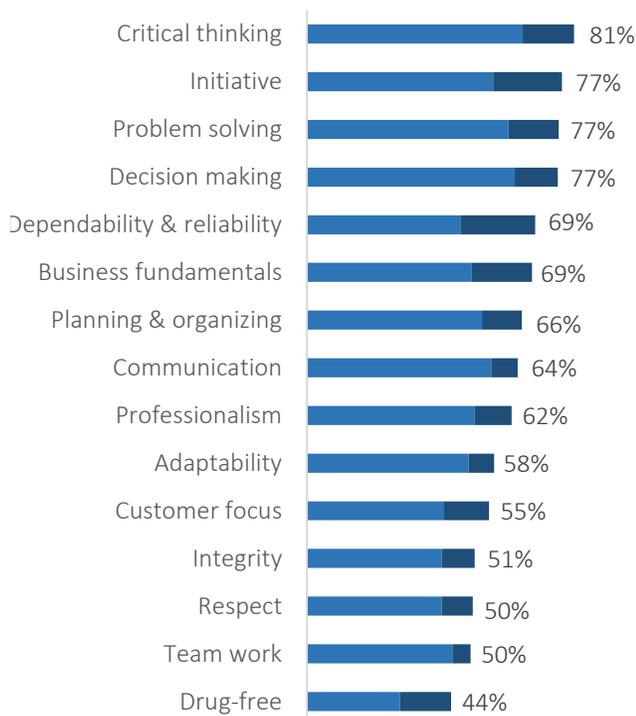
% Difficult + Very Difficult



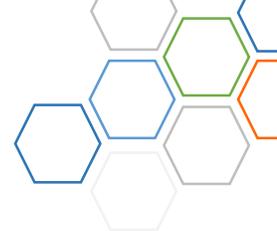
Employability Skills:

Please rate how difficult it is to find candidates with the following skills.

% Difficult + Very Difficult



⁷The list of skills is adapted from the report Common Employability Skills: A Foundation for Success in the Workplace. http://businessroundtable.org/sites/default/files/Common%20Employability_asingle_fm.pdf



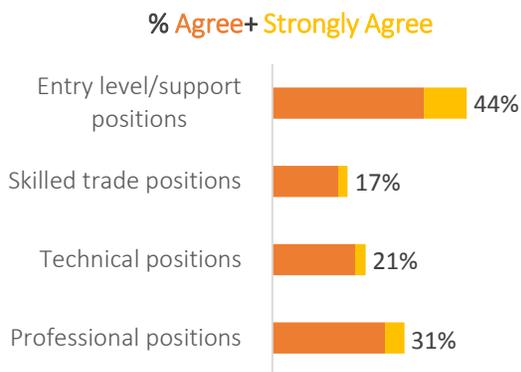
Recruitment and Retention by Job Category

More than 40% of the businesses cited that there is an adequate supply of talents available for entry level/ support positions, while only 31% for professional positions, 21% for technical positions, and 17% for skilled trade positions.

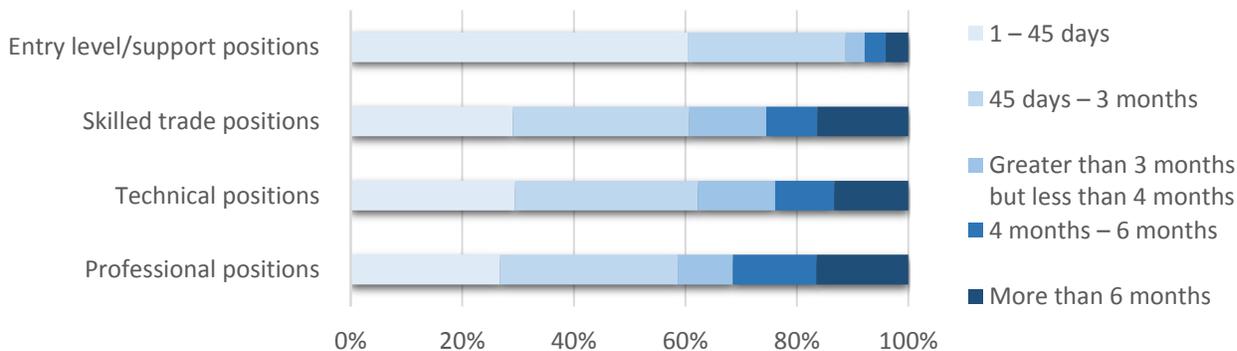
Among survey respondents, almost 90% fill vacancies in entry level/ support positions within three months, while only around 60% respondents are able to fill the other three categories of jobs (professional positions, technical positions, and skilled trade positions) within this time frame. This result is consistent with the question about workforce availability by job category.

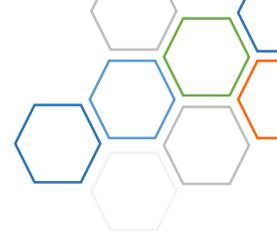
Among these four job categories, survey data suggest that there has been the biggest improvement in both talent attraction and retention in professional positions during 2013-2014.

In our community, there is an adequate supply of talent available to fill these positions at my company.

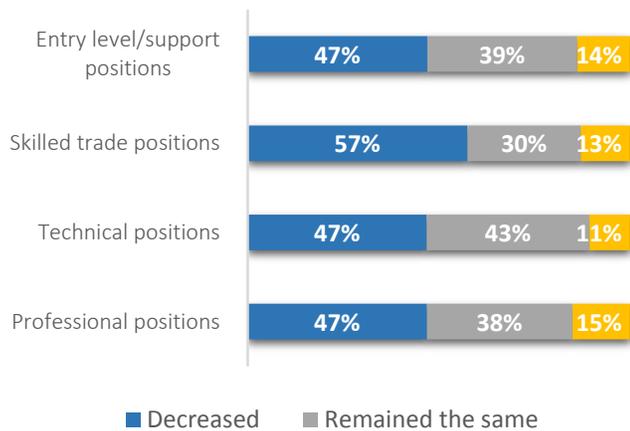


On average over the last year, how many months has it taken to fill job openings?

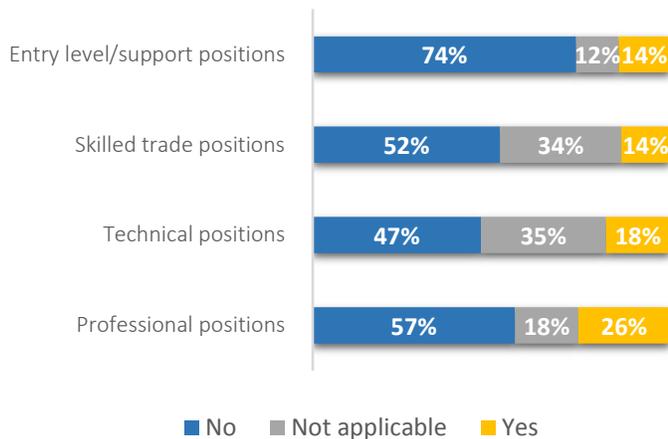


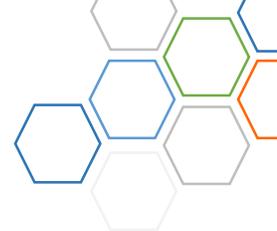


Compared to 2013, has the number of qualified job applicants increased, decreased, or remained the same?



Compared to 2013, has employee retention improved?

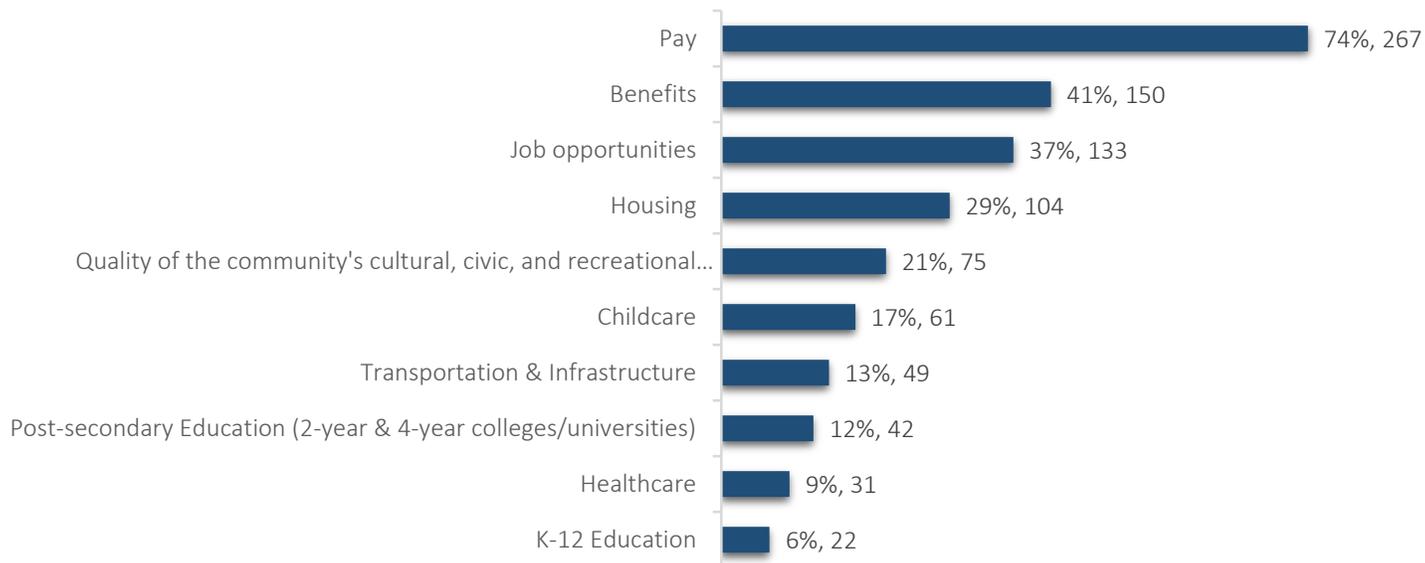




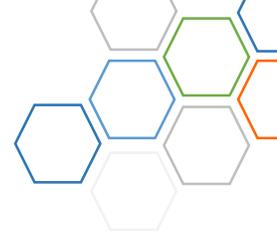
Barriers to Workforce Attraction and Retention

The greatest barrier reported in the survey is pay. Over 70% (267) of respondent ranked pay as one of their top three barriers, including 180 respondents who ranked pay as their greatest barrier.

What do you view as the top 3 greatest barriers to workforce attraction and retention?



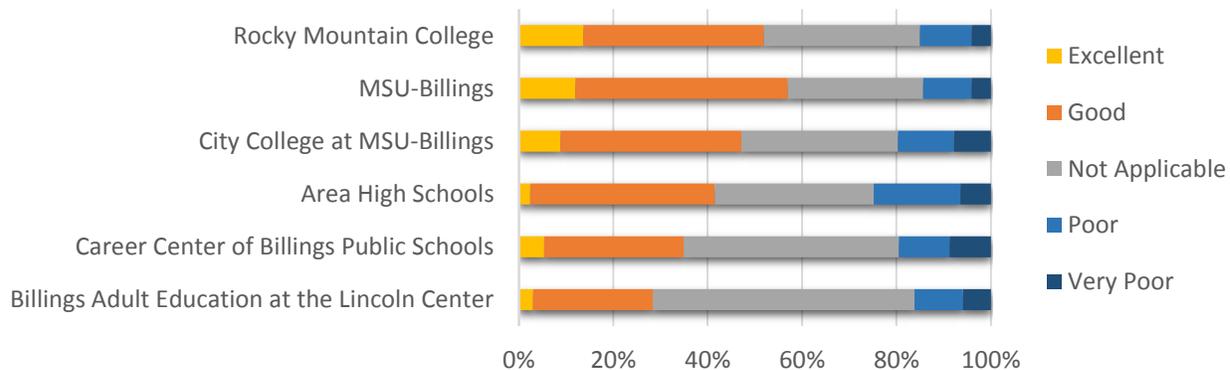
Barriers	Number of Times Ranked as Top 3 Barriers			
	1	2	3	Total
Pay	180	61	26	267
Job opportunities	48	28	57	133
Benefits	20	86	44	150
Housing	19	43	42	104
Quality of the community's cultural, civic, and recreational amenities	17	22	36	75
Post-secondary Education (2-year & 4-year colleges/universities)	10	18	14	42
Healthcare	9	9	13	31
Transportation & Infrastructure	9	12	28	49
Childcare	5	22	34	61
K-12 Education	3	12	7	22

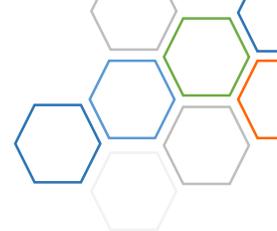


Alignment of Education Providers and Workforce Needs

Nearly half of all businesses who answered this question reported positive feedback (good or excellent) for three education and training providers, including Rocky Mountain College, MSU-Billings, and City College at MSU-Billings. Area High School received over 40% positive feedback, however, it also received the highest rate (over 20%) of negative feedback (poor or very poor).

Please rate how well programs from the the following education and training providers align to your workforce needs.





Survey Method

This survey was distributed by email via Survey Monkey to over three thousand businesses in the BillingsWorks region.

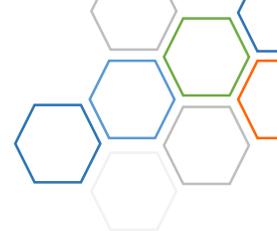
This survey was conducted from January 5, 2015 to February 5, 2015. A total of 363 of respondents completed the survey, representing a statistically relevant sample size with a 5 percent margin of error at a 95 percent confidence level. To protect the confidentiality of the organizations that responded to the survey, survey results are presented in the aggregate.

APPENDIX B: EDUCATION AND TRAINING PROFILE AND GAP ANALYSIS

2015



BillingsWorks
Workforce Council



The BillingsWorks Training Provider Analysis is a snapshot of the current state of workforce training options within Billings and Yellowstone County. As a community, Billings and Yellowstone County have an enviable network of education and training providers that work to prepare a workforce capable of meeting the area’s talent needs. With two universities, a vibrant 2-year college, the state’s only separate career and technical education center, a strong K-12 framework, and adult education, Billings is well positioned to harness these educational assets to prepare the area’s workforce.

The identification and analysis of an area’s current educational capacity provides a baseline to identify deficiencies and to better position the area for growth through a well-stocked, sustainable supply of talent. This inventory of available training assets provides insights into the current capacity and gaps and provides recommendations for increasing Billings’ and Yellowstone County’s capacity to grow utilizing an educational system capable of keeping up with the demands of area employers.

EDUCATION AND TRAINING LANDSCAPE

Within Yellowstone County there are a myriad of education and training options ranging from short, customized training options to four-year degrees and beyond. In total, these providers offer the capability of spanning the full training and workforce needs for Yellowstone County. Institutions and educational assets within Yellowstone include Montana State University – Billings and its associated colleges, Rocky Mountain College, Billings Adult Education, Billings Public Schools and the Billings Career Center.

Education and Training Provider	Level
Montana State University – Billings (and MSU-B colleges)	Postsecondary Education
Rocky Mountain College	Postsecondary Education
Billings Adult Education	Adult Education
Billings Career Center	Public Secondary Education
Billings Senior High School	Public Secondary Education
Billings West High School	Public Secondary Education
Broadview High School	Public Secondary Education
Central Catholic High School	Private Secondary Education
Custer High School	Public Secondary Education
Huntley Project High School	Public Secondary Education
Laurel High School	Public Secondary Education
Shepherd High School	Public Secondary Education
Skyview High School	Public Secondary Education

Montana State University – Billings serves 4,969 (4,465 Undergrad) students. MSU-B has two campuses – one in the downtown Billings area and the other in the west end of Billings – and offers industry certificates, associate, bachelor’s and master’s degrees through five colleges: Arts and Science, Business, Allied Health, Education and City College.

Rocky Mountain College, also located in Billings, is a four-year private, not-for-profit institution offering associates, bachelor’s and master’s degree programs, including the only Physician Assistant program in the



State of Montana. Rocky Mountain College serves 1,067 students and offers fifty liberal arts and professionally oriented majors in 24 undergraduate disciplines.

In addition to the two post-secondary education institutions above, Billings Adult Education offers professional training and certifications. Billings Adult Education offers professional certificates such as Administrative Assistant, Paralegal Studies and Pharmacy Technician. Billings Adult Education fulfills the crucial role of offering avenues for adult learning within the Yellowstone community.

The Billings Career Center, part of Billings Public Schools, offers multiple pathways for career and technical education within Yellowstone County. In concert with core educational requirements, students attending Billings Career Center focus on occupational education and pathways. Students attending the Billings Career Center may also receive college credit through articulation agreements with the area's secondary institutions.

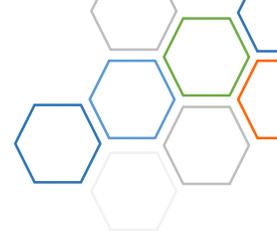
Finally, Yellowstone County has a robust K-12 system that is comprised of nine high schools, one career center, 13 middle schools, and 37 elementary schools. Billings Public Schools is the largest K-12 educational provider within the area. Billings Public Schools serves 16,328 students with an instructional program encompassing pre-kindergarten through 12th grade, as well as Billings Adult Education and the Billings Career Center.

Collectively, these institutions combine to form the training and educational capacity for the Billings area and its employers.

PROFILE OF EDUCATION AND TRAINING PROVIDERS AND THEIR GRADUATES



BillingsWorks
Workforce Council



Montana State University – Billings

1500 University Drive | Billings, MT 59101 | (406) 657-2011

www.msubillings.edu

Montana State University – Billings is a 4-year public institution offering certificates, associate, bachelor’s, and master’s degrees. The university is comprised of five colleges: the College of Business, College of Arts and Sciences, the College of Education, the College of Allied Health, and City College. City College at MSU Billings provides the comprehensive two-year college mission including: university transfer education, career preparation, developmental education, GED preparation through a partnership with School District No. 2, and workforce training.

2013 – 2014 Quick Facts:

Student Population	
Total Students	4,969
Undergraduate	4,465
Graduate	504
Retention and Graduation Rates	
Retention Rate (Full-time Students)	59%
Retention Rate (Part-time Students)	40%
Graduation Rate	48%
Average Age	
University Campus	25.1
City College	24.2
Undergraduate Student Age	
24 and Under	63%
25 and Over	37%
Undergraduate Attendance Status	
Full-time	71%
Part-time	39%
Undergraduate Student Residence	
In State	93%
Out of State	6%
Foreign Countries	1%
Undergraduate Distance Education	
No Distance Education	50%
Some Distance Education	32%
Only Distance Education	18%
Average Time To Graduate (2013 – 2014)	
	4.77 years

Source: College Navigator, National Center for Education Statistics; Montana University System, Complete College America Outcome Metric #4; Montana State University – Billings



Montana State University – Billings Enrollment by College (Fall 2014)

College	Undergraduate Enrollment	Graduate Enrollment	Total Enrollment
Arts & Sciences	1,263	55	1,318
Business	741	0	741
Education	331	199	530
Allied Health Professions	471	109	580
City College	1,279	0	1,279
No College Designated	268	65	333
Total	4,353	428	4,781

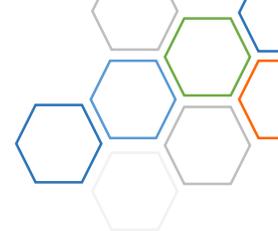
Source: Montana State University – Billings, Institutional Research

Montana State University – Education and Training Program Completion (2013-2014)

Programs/Majors:	Certificate	Associate	Bachelor's	Master's
Biological & Biomedical Sciences	-	-	8	-
Business, Management, Marketing & Related Services	4	39 ^d	127 ^d	-
Communication, Journalism & Related Programs	-	-	35 ^d	14 ^d
Computer & Information Sciences & Support Services	-	23	-	-
Construction Trades	-	5	-	-
Education	-	4	101	78
Engineering Technology & Engineering Related Fields	1	42	-	-
English Language & Literature/Letters	-	-	6	-
Foreign Languages, Literatures & Linguistics	-	-	2	-
Health Professions and Related Programs	51	68	21	36
History, General	-	-	9	-
Homeland Security, Law Enforcement, Firefighting	-	7	20	-
Liberal Arts, Sciences, General Studies, Humanities	-	22	64	-
Mathematics & Statistics	-	-	-	-
Mechanic & Repair Technologies & Technicians	6	27	-	-
Multi/Interdisciplinary Studies	-	-	36	-
Natural Resources & Conservation	-	-	6	-
Parks, Recreation, Leisure & Fitness Studies	-	-	26	5
Physical Sciences	-	-	1	-
Precision Production	2	9	-	-
Psychology	-	-	33	5
Public Administration & Social Service Professions	-	-	-	1
Social Sciences	-	-	13	-
Visual & Performing Public Arts	-	-	10	-
TOTAL	64	246	518	139

Source: College Navigator, National Center for Education Statistics

Notes: (-) indicate the program is not offered at this award level. (d) identifies programs and award levels that are offered as a distance education program. For program category totals, (d) is shown if one or more programs in the category are offered as a distance education program.



History of Degrees Awarded by Type

	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
University Campus								
Associate Degrees	21	29	33	32	40	32	25	33
Bachelor's Degrees	474	502	491	504	492	465	518	469
Master's Degrees	110	121	106	128	125	152	139	127
Total Degrees	605	652	630	664	657	649	682	629
City College								
Certificates	29	31	32	28	29	36	26	26
Associates Degrees	174	203	189	196	211	291	259	240
Total Certificates/Degrees	203	234	221	224	240	327	285	266

Source: Montana State University – Billings, Institutional Research

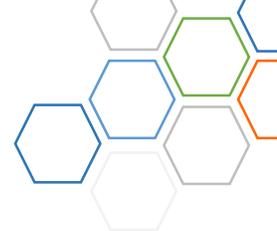
MONTANA STATE UNIVERSITY – BILLINGS GRADUATE OUTCOMES

Location after Graduation	Billings	Other MT	Out-of-State
Total BA/BS Graduates	50%	33%	17%
MA/MS Graduates	44%	34%	22%
City College Graduates	66%	20%	14%

Source: Montana State University – Billings, Class of 2013 Graduate Data

Post-Graduation Status by College	Number of Graduates	Employed		Continuing Edu	Not Seeking Employ.	Military Service	Total Placed*
		In Field	Out of Field				
College of Applied Health	65	29	6	6	3	0	98%
College of Arts and Sciences	267	80	62	20	1	2	97%
College of Business	136	55	21	7	2	0	99%
College of Education	100	64	7	2	4	0	100%
City College	285	116	33	52	5	1	96%

Source: Montana State University – Billings, Class of 2013 Graduate Data. (*) Total Placed calculations based on total number of respondents, not number of graduates.



Rocky Mountain College

1511 Poly Drive | Billings, Montana 59102-1796 | (406) 657-1000

rocky.edu

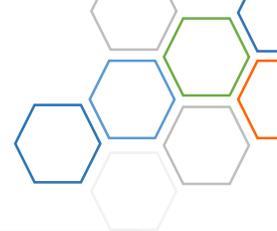
Rocky Mountain College is a four-year, private not-for-profit university that offers associate, bachelor's, and master's degrees to its students.

2013 – 2014 Quick Facts:

Student Population	
Total Students	1,067
Undergraduate	988
Graduate	79
Retention and Graduation Rates	
Retention Rate (Full-time Students)	68%
Retention Rate (Part-time Students)	N/A
Graduation Rate	40%
Average Age	
Degree Seeking Undergraduate Students	23.5
Non-Degree Seeking Undergraduate Students ¹	20.9
Total (including Graduate students)	22.1
Undergraduate Student Age	
24 and Under	89%
25 and Over	11%
Undergraduate Attendance Status	
Full-time	96%
Part-time	4%
Undergraduate Student Residence	
In State	57%
Out of State	39%
Foreign Countries	4%
Undergraduate Distance Education	
No Distance Education	100%
Some Distance Education	0%
Only Distance Education	0%
Average Time To Graduate (2013 – 2014)	
	N/A

Source: College Navigator, National Center for Education Statistics; Rocky Mountain College

¹Non-Degree Seeking undergraduate students include high school students and other students taking college courses for credit, but not toward a degree.



Rocky Mountain College – Education and Training Program Completion (2013-2014)

Programs/Majors:	Certificate	Associate	Bachelor's	Master's
Agriculture, Ag Operations and Related Sciences	-	-	16	-
Biological & Biomedical Sciences	-	-	14	-
Business, Management, Marketing & Related Support Services	-	-	37	3
Communication, Journalism, and Related Programs	-	1	5	-
Computer and Info Sciences and Support Services	-	-	6	-
Education	-	-	17	16
English Language and Literature/Letters	-	-	5	-
Health Professions and Related Programs	-	-	1	29
History	-	-	6	-
Mathematics and Statistics	-	-	1	-
Natural Resources and Conservation	-	-	6	-
Parks, Recreation, Leisure, and Fitness Studies	-	-	24	-
Philosophy and Religious Studies	-	-	2	-
Physical Sciences	-	-	4	-
Psychology	-	-	7	-
Social Sciences	-	-	2	-
Transportation and Materials Moving	-	-	15	-
Visual and Performing Arts	-	-	7	-
TOTAL	-	1	175	48

ROCKY MOUNTAIN COLLEGE GRADUATE OUTCOMES

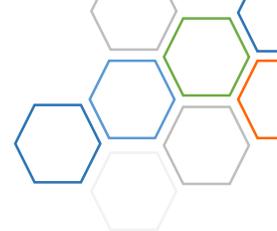
Success Rate of Rocky Mountain Graduates (2013)	
Full-time Employed or Full-time Graduate Student	86%
Employed Full-time	70%
Employed Part-time	10%
Pursuing further Education	16%
Employed residents working in Montana	56%
Employed residents working in Billings	51%

Source: Rocky Mountain College, Class of 2013 Graduate Report



Post-Graduation Status by Program	Number of Students	Employed		Continuing Education
		In Field	Out of Field	
Business and Technology				
Aviation	15	13	1	-
Business Administration, Economics, Accounting	37	23	6	4
Computer Science	7	6	-	1
Equestrian Studies	12	5	1	2
Humanities and Fine Arts				
Communications Studies	7	4	-	1
Literary Studies	4	-	2	2
Fine Arts (Art, Music, Theater)	7	3	3	-
Natural Sciences and Math				
Biology, Chemistry, Math	17	9	3	2
Environmental Science	6	4		
Geology	5	2	-	2
Social Science and Education				
Education	5	3	2	-
History and Political Science	3		2	1
Physical Education and Health	29	8	5	5
Psychology	8	2	4	2
Sociology	2	-	-	1
TOTAL	164	82	29	23

Source: Rocky Mountain College, Class of 2013 Graduate Report; Note: For post-graduation status by program, numbers are based on survey respondents, not total graduates.



K-12 Education Institutions

Yellowstone County High School Student Enrollment by Grade Level (2012 – 2013)

School	Grade 9	Grade 10	Grade 11	Grade 12	Total Enrollment
Billings Senior High School	444	444	429	368	1,685
Billings West High School	532	515	454	472	1,973
Broadview High School	14	8	18	10	50
Central Catholic High School	96	95	70	86	347
Custer High School	8	7	6	5	26
Huntley Project High School	59	53	69	59	240
Laurel High School	167	168	151	123	609
Shepherd High School	66	71	49	60	246
Skyview High School	402	382	415	363	1,562
Total Yellowstone County	1,788	1,743	1,661	1,546	6,738

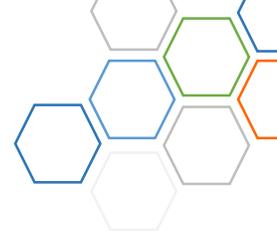
Source: National Center for Education Statistics

Yellowstone County High School (2009-2010)

School	Capture Rate	Remediation Rate	Retention Rate
Billings Senior High School	41%	35%	76%
Billings West High School	42%	35%	73%
Broadview High School	17%	50%	75%
Central Catholic High School	N/A	N/A	N/A
Custer High School	33%	0%	*
Huntley Project High School	52%	48%	80%
Laurel High School	43%	35%	76%
Shepherd High School	25%	21%	71%
Skyview High School	41%	35%	73%
Yellowstone County	41%	35%	74%
State of Montana	35%	30%	74%

Source: Montana Office of Public Instruction, Growth and Enhancement of Montana Students (GEMS)

Notes: Capture rate represents the percentage of recent MT public high school graduates enrolling in the MUS in the fall semester following graduation. Remediation rate represents the percentage of recent MT public high school graduates enrolling in at least one remedial math or writing course. Retention rate represents the percentage of recent MT public high school graduates returning for a second year of enrollment in the MUS. (*) indicates data less than 5 students that has been repressed.



Yellowstone County High School Dropout Rate by School (2012 – 13)

School	Dropout Rate
Billings Senior High School	4.8%
Billings West High School	3.0%
Broadview High School	0.0%
Central Catholic High School	N/A
Custer High School	0.0%
Huntley Project High School	0.8%
Laurel High School	2.1%
Shepherd High School	3.3%
Skyview High School	4.5%
State of Montana	3.6%

Source: Montana Office of Public Instruction

Note: Data only available for public high schools; Central High School not available.

Free and Reduced Lunch Eligibility (2012 – 2013)

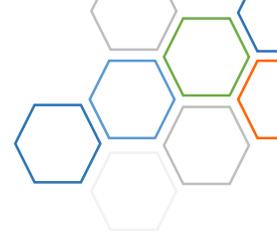
School	Free Lunch Eligible	Reduced-Price Lunch Eligible	Total Eligible for Free & Reduced Lunch	
Billings Senior High School	380	107	487	29%
Billings West High School	300	90	390	20%
Broadview High School	10	8	18	36%
Central Catholic High School	NA	NA	NA	NA
Custer High School	4	8	12	46%
Huntley Project High School	60	28	88	37%
Laurel High School	74	27	101	17%
Shepherd High School	57	15	72	29%
Skyview High School	251	100	351	22%
Total Yellowstone County	1,136	383	1,519	23%

Source: National Center for Education Statistics

K-12 Career and Technical Education Enrollment (2013 – 2014 School Year)

Enrollment by School	Males	Females	Total
Total Students	4,771	3,365	8,136
Billings Public Schools	3,702	2,621	6,323
Broadview High School	63	30	93
Laurel High School	431	310	741
Shepherd High School	230	195	425
Huntley Project High School	345	209	554

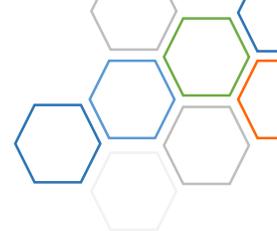
Source: Billings Career Center; Data not available for Custer High School or Central Catholic High School.



K-12 Career and Technical Education Enrollment (2013 – 2014 School Year)

Enrollment by Program	Males	Females	Total
Advanced Shop	4	0	4
Agriculture	433	148	581
Automotive	627	69	696
Business	1,525	1,309	2,834
Computer Technologies	467	94	561
Construction	272	15	287
Culinary Arts	512	740	1,252
Drafting	18	8	26
Early Childhood	31	444	475
Electrical	106	8	114
Engineering	201	46	247
Family and Consumer Science	48	65	113
Family Life/Single Survival	152	313	465
Graphic Design	269	317	586
Interior Design	17	159	176
Medical	109	347	456
Metals	347	43	390
Textiles	38	163	201
Woodworking	701	47	748

Source: Billings Career Center; Data not available for Custer High School or Central Catholic High School.



Billings Adult Education

415 N 30th St, Billings MT 59101 | (406) 281-5001

<http://www.billingscommunityed.org/>

Billings Adult Education offers students the ability to earn certificates or their high school equivalency.

Billings Adult Education Quick Facts (2011-2012)

Students Served (2011 – 2012)	
Students Served 12 hours or more	696
Students Served Less than 12 hours	211
Students by Age (2011 – 2012)	
Age 16 – 18	20%
Age 19 – 24	26.5%
Age 25 – 44	38.6%
Age 45 – 59	14.4%
Age 60 and older	0.6%
Educational Goals (2009 – 2010)	
Earn a High School Equivalency	28.9%
Enter Employment	31.8%
Retain a Job	39.5%
Transition to Post-Secondary Employment	42.5%

Source: Montana Office of Public Instruction, Growth and Enhancement of Montana Students (GEMS)

Billings Adult Education – Programs Offered

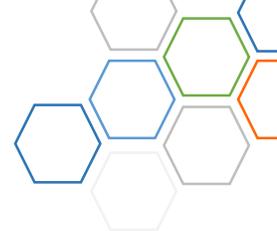
High School Equivalency Test	HiSET (formerly the GED)
Certificate Programs	Accounting
	Administrative Assistant
	Business Online for Beginners
	Certified Nursing Assistant (CNA)
	Certified Phlebotomy Technician
	Electrocardiograph (ECG/EKG) Technician
	Fundamentals of Dental Assisting
	Medical Assistant
	Medical Coding
	Medical Transcriptionist
	Paralegal
Assessments	Pharmacy Technician
	Point of Care
	Test of Adult Basic Education (TABE)
	Compass (college preparation for Academic Center Students)
	WorkKeys



TRAINING GAP ANALYSIS



BillingsWorks
Workforce Council



GAP ANALYSIS

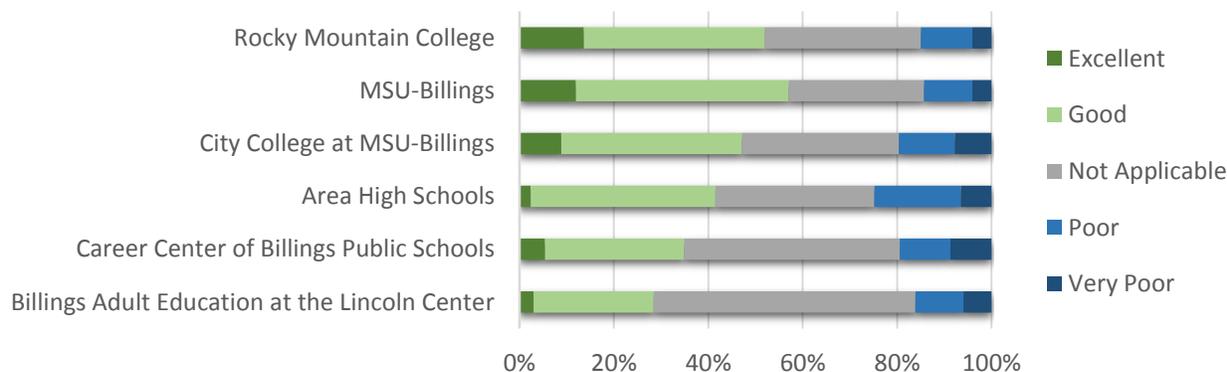
While Billings and Yellowstone County have a robust K-12 education system and multiple post-secondary assets to draw upon, there are still gaps in addressing the talent development needs of employers. In order to determine what gaps exist in the education and training supply system, data gathered in the State of the Workforce report was compared to the program offerings and certificate and degree completion data capture in the training inventory.

In 2012 - 2013, approximately 2,352 students graduated from high school or post-secondary education in Yellowstone County.

EMPLOYER TRAINING NEEDS

Overall, the BillingsWorks Workforce Survey found that employers are confident in the quality of postsecondary education in Yellowstone County but report less confidence in secondary institutions. **Nearly half of all businesses who responded rated highly the quality of three education and training providers: Rocky Mountain College, MSU-Billings, and City College at MSU-Billings.** Area High Schools received over 40% positive feedback; however, it also received the highest rate (over 20%) of negative feedback from survey respondents.

Please rate how well programs from the the following education and training providers align to your workforce needs.



In regard to skills, employers find it difficult to find candidates with industry-specific technical skills and preferred credentials. General skills (such as reading, writing, and mathematics) were reported as relatively easy to find.

According to survey data, an even greater challenge is finding candidates with employability skills. Half of survey respondents stated they had problems finding candidates in almost all of the example employability skills, but they have the most difficulty finding candidates with sufficient critical thinking, initiative, and problem solving skills.



The specific education and training needs vary based on industry sectors. A summary of survey data and input from industry-specific focus groups is included below. In addition to the survey data, focus groups and interviews conducted during the strategic planning process highlighted several training needs. Sectors included in the focus groups included: IT, Data, and Communications; Energy, Manufacturing, Engineering, and Transportation; Hospitality, Retail, and Services; and Healthcare and Senior Services.

Information Technology, Data, and Communications

- IT training capacity needs to expand; there are too few applicants and more trained individuals are needed, specifically for software developers.
- Existing post-secondary programs at the certificate and associate level provide good training, but do not produced candidates with sufficient depth of knowledge. In other words, graduates have knowledge about a broad range of IT areas, but not deep knowledge in any.
- Additional IT ‘core’ programs are needed from providers.
- Students need to be exposed to IT careers at a younger age to increase their awareness and pique their interests.
- Customer service and soft skills are lacking and should be embedded within training programs.
- IT education and training providers can help to recruit more women into the industry and IT occupations.

Specific training programs identified include:

Microsoft Query Analyzer	Video training
Microsoft Application training	Graphic Design
SSMS training	ACI Certification
Advanced Technology	3D Modeling
Computer Science Program	

Manufacturing, Energy, and Transportation

- There is a need for technical skills in candidates, specifically related to mechanics, welders and industrial maintenance candidates.
- Students and many k-12 school personnel do not understand the career opportunities within these industries.
- Billings Career Center offers high quality programs and should be expanded.
- Education that is available is not very nimble. It takes too long to start new programs.

Specific professional training programs identified include:

Civil Engineers	CAD Design
Construction Engineers	Full Engineering program
Planners	Power Plant Technology
Surveyors	Environmental Engineers
Mining Engineers	

Specific technical and skilled trades training programs identified include:

2-year HVAC degrees	Carpentry
Refrigeration Technician	Diesel Mechanic
Service Technician	Electrical courses
Construction and Safety-related courses	Tow Master Certification



Healthcare

- There is limited capacity in the Associate of Science in Nursing (ASN) program available at City College. Furthermore, there is great need from the healthcare organizations for Registered Nurses who have earned a Bachelor’s of Science in Nursing (BSN) due to changes in the healthcare system. This is severely hindering healthcare employers’ talent pipeline.
- It is difficult to find Certified Nursing Assistants. Although there are training programs at Billings Adult Education and City College, more training capacity is needed.
- Healthcare wants to work with education to engage more students the field.
- State wait lists for programs (e.g. RNs) demonstrate high demand. Additional capacity must be developed.

Specific professional and technical training programs identified include:

MRI Technician	Medical Technologist
Ultrasound Technician	Accredited Medical Assistant Cert Program
Pharmacy Technician	Personal Care
Respiratory Therapy	Home Health Aids
Physical Therapy	Occupational Therapy
Chiropractic Assistant and Certification Programs	Certified Vet Tech Program
Speech Therapy	Nurse Practitioner

Additional Training and Education Needs Identified by Employers

Additional training and skill gaps identified in the survey and focus groups include:

- Soft skills training is not readily available in the area.
- Hospitality training program
- Real Estate courses
- Project Management
- Security training
- Interior Design
- Cosmetology
- Media Buying
- Advertising
- Entrepreneurial training

PROJECTED DEMAND FOR OCCUPATIONS IN SOUTH CENTRAL MONTANA

While data gathered through primary research such as the BillingsWorks Workforce Survey and industry focus groups is the best indicator of skill needs and industry trends, occupational projections also provide insights into the long-term growth of occupational groupings in the area. **Reviewing occupational projections for the South Central region of Montana⁸ suggests there will be an average of 4,253 job openings each year between 2012 and 2022.** Occupational groups with the greatest growth from 2012 to 2022 will be Office and Administrative Support Occupations (2,264), Food Preparation and Serving Related Occupations (1,856), Construction and Extraction Occupations (1,761), Sales and Related Occupations

⁸The South Central Region of Montana includes Big Horn, Carbon, Fergus, Golden Valley, Judith Basin, Musselshell, Petroleum, Stillwater, Wheatland, and Yellowstone counties.



(1,605), Transportation and Material Moving Occupations (1,287), Healthcare Practitioners and Technical Occupations (1,278), and Installation, Maintenance, and Repair Occupations (788).

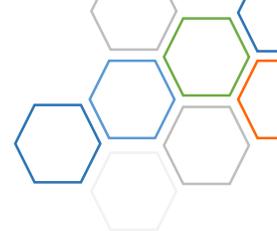
SOC	Occupation	Employment		Change		Average Annual Openings		
		2012	2022	#	%	Growth	Replace	Total
	Total, All Occupations	106,010	123,079	17,069	16.1%	1,734	2,519	4,253
430000	Office and Administrative Support Occupations	16,122	18,386	2,264	14.0%	240	324	564
350000	Food Preparation and Serving Related Occupations	10,897	12,753	1,856	17.0%	186	412	598
470000	Construction and Extraction Occupations	7,720	9,481	1,761	22.8%	176	136	312
410000	Sales and Related Occupations	12,959	14,564	1,605	12.4%	170	378	548
530000	Transportation and Material Moving Occupations	8,262	9,549	1,287	15.6%	129	175	304
290000	Healthcare Practitioners and Technical Occupations	6,720	7,998	1,278	19.0%	128	140	268
490000	Installation, Maintenance, and Repair Occupations	4,927	5,715	788	16.0%	80	118	198
130000	All Business and Financial Operations Occupations	3,635	4,376	741	20.4%	74	76	150
390000	Personal Care and Service Occupations	2,957	3,677	720	24.3%	72	56	128
510000	Production Occupations	4,358	5,068	710	16.3%	72	103	175
170000	Architecture and Engineering Occupations	2,241	2,897	656	29.3%	66	51	117
110000	All Management Occupations	4,208	4,808	600	14.3%	60	86	146
310000	Healthcare Support Occupations	2,623	3,102	479	18.3%	48	50	98
370000	Building and Grounds Cleaning and Maintenance Occupations	4,389	4,830	441	10.0%	44	88	132
150000	Computer and Mathematical Occupations	1,136	1,488	352	31.0%	35	19	54
250000	Education, Training, and Library Occupations	4,839	5,181	342	7.1%	34	107	141
210000	Community and Social Service Occupations	2,059	2,377	318	15.4%	32	47	79
270000	Arts, Design, Entertainment, Sports, and Media Occupations	1,920	2,196	276	14.4%	28	47	75
230000	Legal Occupations	934	1,158	224	24.0%	22	15	37
190000	Life, Physical, and Social Science Occupations	1,027	1,215	188	18.3%	20	33	53
330000	Protective Service Occupations	1,578	1,720	142	9.0%	14	44	58
450000	Farming, Fishing, and Forestry Occupations	499	540	41	8.2%	4	12	16

Source: Montana Department of Labor & Industry, Research and Analysis Bureau

Not surprisingly when coupled with employers' input from the focus groups, the occupations with the highest number of annual job openings are Food Preparation and Serving Related Occupations (598) and Office and Administrative Support Occupations (564), and Sales and Related Occupations (548). While these occupational groups will have significant annual openings, training and education investments are not recommended due to lower than average wages each offers (see State of the Workforce Report).

On the other hand, Construction and Extraction Occupations (312, \$45,250), Healthcare Practitioners and Technical Occupations (268, \$73,250), and Installation, Maintenance, and Repair Occupations (190, \$42,280) also offer high numbers of average annual openings *and* higher than average wages. Investments of time and funding into education and training programs aligned to these occupations will have a higher return on investment for individuals and the community.

While occupational projects are helpful in understanding future demand and average openings, there is reason to believe that growth may already be exceeding these projections in the Billings area. For example, according to projection data, there will be 268 annual job openings for Healthcare Practitioners and Technical Occupations. However, at the time of writing this report (March 2015), **there are over 420 open positions with just three of our healthcare providers.**



IDENTIFIED GAPS

Based on the information collected through the training provider profiles, employer survey, focus groups, and interviews, the following education and training gaps have been identified:

- **Healthcare education and training** – Healthcare education and training programs need to be expanded in Yellowstone County. In particular, wait lists demonstrate demand for existing programs at Rocky Mountain College and nursing programs should be expanded at Montana State University – Billings.

With the existing Associate of Science in Nursing (ASN) program at City College, MSU-Billings should establish a Bachelor of Science in Nursing (BSN) program with specific pathways from the ASN degree program to the BSN degree. As the healthcare hub for the region, this will support healthcare providers identified needs.

- **Depth vs. Breadth in IT education and training** – The employer focus group and survey responses from IT employers confirmed the need for more specific IT education and training in Yellowstone County. The existing programs provide a good foundation, but individuals should have the opportunity to develop more specific skills and knowledge.
- **Education and training programs for skilled trades** – At MSU-Billings, there were 92 certificates and associate degrees completed in 2013-2014 in engineering-related fields and skilled trades (Engineering Technology & Engineering-Related Fields, Construction Trades, Mechanic & Repair Technologies and Technicians, and Precision Production). With an estimated 802 average annual openings in related occupations between 2012 and 2022, the training and education outputs will not keep up with employer demand. Enrollment and training capacity in these programs need to be significantly increased.
- **Employability skills training** – Employers have voiced loudly the lack of employability skills within the existing workforce. The challenge, however, is that employability skills are not ideally developed through a singular training programs or curriculum. Instead, employability skills training is most successful when it is embedded throughout an entire career pathway and used as a foundation for academic, technical, and industry-specific skills. Therefore, all education and training providers in Yellowstone County should consider embedding employability skills within their curriculum.
- **Retaining “talent in transition”** – **In 2014, approximately 2,352 local students (1,661 high school students and 1,191 post-secondary graduates) transitioned from education.**⁹ For BillingsWorks and its employer partners, it is critical that this “talent in transition” is transitioned either into a) further education and training within Yellowstone County or b) connected to career opportunities within

⁹ Note: This estimate is based on 11th grade enrollment in secondary education for 2012 – 2013 and post-secondary certificate and degree completions in 2013 – 2014. Because only data for these years is available, it is assumed that graduation



Yellowstone County. Due to the severity of employer workforce needs, it is important that as many individuals within the talent pipeline are retained within the Billings talent pool.

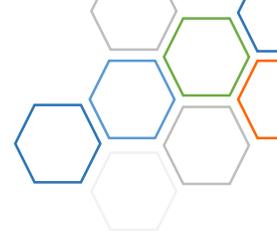
Of the 2013 – 2014 class, 50 percent of MSU – Billings baccalaureate graduates, 66 percent of City College graduates, and 51 percent of Rocky Mountain College graduates remained located in the Billings community after graduation. Assuming on average that 50 percent of the postsecondary graduates stay in Billings after matriculating, this means approximately 595 are leaving Billings for employment or further education elsewhere. BillingsWorks and its partners need to increase connections between employers and these emerging graduates and promote the benefits of living and working in the Billings community to them.

- **Clear mechanism for understanding industry needs** – While MSU-Billings and the Billings Career Center have active advisory boards that help to validate curriculum, there is not a clear way for employers to connect with education providers to share their sector-specific training and skill needs. In focus groups, employers talked about a lack of coordination among training providers. Whether this is real or perceived, it speaks to the need to clarify the process for employers to share their industry-specific skill needs with education, which in turn can be used to inform career pathways and curriculum. BillingsWorks can help to facilitate a sector or industry-specific focus group to provide on-going, real-time feedback to the community’s education and training providers.

APPENDIX C: WORKFORCE INDICATORS FOR PEER COMMUNITIES

2015





Workforce Indicators and Benchmarking Data

The BillingsWorks Workforce Council is interested in understanding where its peer communities are in regard to the workforce indicators identified in its State of the Workforce Report. The peer communities that have been selected are:

- Bozeman/Gallatin County, MT
- Missoula/Missoula County, MT
- Idaho Falls/Bonneville County, ID
- Rapid City/Pennington County, SD
- Sioux Falls/Minnehaha County, SD
- Cheyenne/Laramie County, WY

Comparison data for these peer communities has been captured when available from publically available data sets and are included below.

Demographic Indicators

Population Aged 25 – 64	2010	2013	% Change
Bonneville County, ID	51,261	51,796	1.03%
Gallatin County, MT	48,112	48,430	0.66%
Missoula County, MT	58,659	58,414	-0.42%
Yellowstone County, MT	78,815	79,971	1.47%
Minnehaha County, SD	91,030	93,126	2.25%
Pennington County, SD	52,860	53,847	1.83%
Laramie County, WY	48,916	49,529	1.24%

Source: US Census Bureau; American Community Survey, 2013 Five-year Estimates

Labor Force Participation (2013)	
Bonneville County, ID	65.9%
Gallatin County, MT	72.0%
Missoula County, MT	69.7%
Yellowstone County, MT	68.8%
Minnehaha County, SD	74.4%
Pennington County, SD	67.9%
Laramie County, WY	65.1%
State of Montana	64.2%
USA	63.8%

Source: American Community Survey, 2013 Five-year Estimates



Per Capita Personal Income	2010	2013
Bonneville County, ID	\$34,606	\$38,616
Gallatin County, MT	\$35,477	\$40,670
Missoula County, MT	\$33,844	\$37,397
Yellowstone County, MT	\$37,707	\$42,635
Minnehaha County, SD	\$40,908	\$44,949
Pennington County, SD	\$39,711	\$42,346
Laramie County, WY	\$44,798	\$51,870
Montana	\$34,612	\$39,366
USA	40,144	44,765

Source: US Bureau of Economic Analysis

Housing Indicators

Homeownership Rate (2013)	2013
City of Billings	63.3%
Bonneville County, ID	73.0%
Gallatin County, MT	61.8%
Missoula County, MT	58.8%
Yellowstone County, MT	68.8%
Minnehaha County, SD	64.4%
Pennington County, SD	65.4%
Laramie County, WY	68.2%
Montana	68.3%
USA	64.9%

Source: US Census Bureau

Median Monthly Housing Costs	2013
Bonneville County, ID	\$828
Gallatin County, MT	\$968
Missoula County, MT	\$860
Yellowstone County, MT	\$842
Minnehaha County, SD	\$848
Pennington County, SD	\$896
Laramie County, WY	\$912
State of Montana	\$748
USA	\$1,012

Source: American Community Survey, 2013 Five-year Estimates



Housing Units 2013	Total	Occupied	Vacant	Vacancy Rate
Bonneville County, ID	39,920	36,066	3,854	9.7%
Gallatin County, MT	42,639	36,973	5,666	13.3%
Missoula County, MT	50,299	45,523	4,776	9.5%
Yellowstone County, MT	64,240	61,023	3,217	5.0%
Minnehaha County, SD	72,443	67,623	4,820	6.7%
Pennington County, SD	45,270	40,723	4,547	10.0%
Laramie County, WY	40,582	36,859	3,723	9.2%

Source: American Community Survey, 2013 Five-year Estimates

Education Indicators

Educational Attainment of the Total Population over Age 25	High school graduate or higher	Associate degree or higher	Bachelor's degree or higher
Bonneville County, ID	90.5%	36.6%	26.0%
Gallatin County, MT	96.1%	51.9%	46.0%
Missoula County, MT	94.5%	47.2%	39.1%
Yellowstone County, MT	92.3%	36.0%	28.7%
Minnehaha County, SD	90.7%	40.7%	29.2%
Pennington County, SD	91.6%	37.8%	27.8%
Laramie County, WY	93.3%	37.7%	25.1%
State of Montana	92.1%	36.8%	28.7%
USA	86.0%	36.6%	28.8%

Source: American Community Survey, 2013 Five-year Estimates

Job and Workforce Indicators

Average Annual Wage, All Industries	2013
Bonneville County, ID	\$32,613
Gallatin County, MT	\$36,487
Missoula County, MT	\$35,843
Yellowstone County, MT	\$41,857
Minnehaha County, SD	\$41,949
Pennington County, SD	\$36,625
Laramie County, WY	\$42,148
Montana	\$37,575

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages



2013 Employment by Occupation (for MSAs)

SOC	Occupation	Idaho Falls, ID	Billings, MT	Missoula, MT	Rapid City, SD	Sioux Falls, SD	Cheyenne, WY
	All Occupations	50,150	82,610	55,620	60,640	141,470	44,370
11-0000	Management Occupations	2,180	2,720	1,910	1,610	4,310	2,300
13-0000	Business and Financial Operations Occupations	1,290	3,130	2,150	2,330	7,510	2,410
15-0000	Computer and Mathematical Occupations	550	1,310	940	840	3,530	950
17-0000	Architecture and Engineering Occupations	660	1,660	760	880	1,320	750
19-0000	Life Physical and Social Science Occupations	720	570	1,200	630	820	550
21-0000	Community and Social Service Occupations	990	1,930	1,260	1,000	1,890	610
23-0000	Legal Occupations	280	620	590	430	790	560
25-0000	Education Training and Library Occupations	2,950	3,660	3,480	3,250	5,240	3,000
27-0000	Arts Design Entertainment Sports and Media Occupations	560	1,190	1,030	790	2,270	510
29-0000	Healthcare Practitioners and Technical Occupations	2,850	6,000	4,180	4,690	12,380	2,730
31-0000	Healthcare Support Occupations	1,400	1,880	1,190	1,480	3,790	1,130
33-0000	Protective Service Occupations	890	1,470	950	1,210	1,920	960
35-0000	Food Preparation and Serving Related Occupations	4,730	9,290	6,150	6,600	12,580	4,230
37-0000	Building, Grounds Cleaning and Maintenance Occupations	1,550	2,920	2,330	2,870	5,100	1,650
39-0000	Personal Care and Service Occupations	2,170	2,160	2,130	1,870	4,360	970
41-0000	Sales and Related Occupations	6,170	10,800	6,840	7,770	16,840	3,620
43-0000	Office and Administrative Support Occupations	8,450	13,460	9,500	9,650	25,630	6,930
45-0000	Farming Fishing and Forestry Occupations	670	160	210	100	150	NA
47-0000	Construction and Extraction Occupations	2,280	4,850	2,150	3,830	6,170	3,220
49-0000	Installation Maintenance and Repair Occupations	2,110	3,840	2,270	2,510	5,060	2,300
51-0000	Production Occupations	2,780	3,100	1,620	2,560	9,790	1,410
53-0000	Transportation and Material Moving Occupations	3,950	5,900	2,760	3,740	10,000	3,580

Source: US Bureau of Labor Statistics, Occupational Employment Statistics; Note: Data is only available at the MSA level; data not available for Bozeman, MT.



BillingsWorks
Workforce Council